



STATE OF NORTH DAKOTA

HUMAN RESOURCES MANUAL FOR ACTIVE EMPLOYEES

**PEOPLESOFT
VERSION 8.9**



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Written by MAXIMUS-ERP Solutions Group, March 2003 and revised by OMB, October 2006.

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MANAGING POSITIONS

OVERVIEW

PeopleSoft Human Resources employs an integrated, table-driven design to help your organization keep an effective-dated history of all positions in your organization, regardless of whether they are filled. Therefore, you can track your organizational reporting relationships independently of the employees in the positions.

The State of North Dakota has chosen to use position management functionality. This requires that the position be properly configured prior to being associated with an employee. Position management allows you to set up all the position data in advance. That way, when you hire an employee, all you do is assign them to a position, and the system uses the position information to fill out much of the job data record. This saves time and reduces errors for those involved in the hiring process.

OBJECTIVES

At the completion of this section, you will be able to:

1. Create a New Position
2. Update Position Info To:
 - Update a position
 - Reclassify a position
 - Inactivate a position

CREATING POSITIONS

OVERVIEW

The Add/Update Position Info pages are where positions are defined. You will create and maintain position information on these pages. After you've assigned employees to the positions, this is also where you will update data that affects both positions and incumbents.

The Add/Update Position Info component contains three pages. The following table lists the pages and describes the required actions you need to take on each page to create a new position.

Page	Actions Taken
Description	<p><u>Position Information</u>: Enter Effective Date, Status (<i>Active</i> or <i>Inactive</i>), Reason, Position Status (<i>Approved</i>, <i>Frozen</i>, or <i>Proposed</i>), and Status Date.</p> <p><u>Job Information</u>: Enter Business Unit, Job Code, Reg/Temp, and Full/Part Time.</p> <p><u>Work Location</u>: Company (ND), Department and Location</p> <p><u>FLSA Status</u></p>
Specific Information	<p>Check the Update Incumbents, Include Salary Plan Grade and Budgeted Position checkboxes.</p> <p>Education and Government: Enter FTE, check if Adds to FTE Actual Count</p>
Budget and Incumbents	No action required. Displays current incumbent and current budget information.

CREATING A NEW POSITION

To begin the process of creating a new position, use the following navigational path: **Main Menu > Organizational Development > Position Management > Maintain Positions Budgets > Add/Update Position Info**. The following page will appear.

Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

Position Number:

begins with

Description:

begins with

Position Status:

=

Business Unit:

begins with

Department:

begins with

Job Code:

begins with

Reports To Position Number:

begins with

☐ Include History
 ☐ Correct History
 ☐ Case Sensitive

Search

Clear

[Basic Search](#)
[Save Search Criteria](#)

[Find an Existing Value](#)
[Add a New Value](#)

Note: This will be the initial page you will see for all position management transactions.

To create a new position, click on the [Add a New Value](#) hyperlink. The following page will appear.

Click on Add – **the system will assign a position number.**

Add/Update Position Info

[Find an Existing Value](#)
[Add a New Value](#)

Position Number:

00000000

Add

[Find an Existing Value](#)
[Add a New Value](#)

Description

Specific Information

Budget and Incumbents

Position Information

Find | View All

First 1 of 1 Last

Position Number:

00000000

Headcount Status:

Current Head Count: 0 out of 0

*Effective Date:

09/20/2006

*Status:

Active

Initialize

Reason:

NEW New Position

Action Date:

09/20/2006

*Position Status:

Approved

Status Date:

09/20/2006

Key Position

Job Information

*Business Unit:

11000 Office of Mgmt & Budget

Job Code:

Manager Level:

*Reg/Temp:

Full-Time

*Regular Shift:

N/A

Union Code:

Title:

Short Title:

Detailed Position Description

Work Location

*Reg Region:

USA United States

Department:

*Company:

Location:

Reports To:

Dot-Line:

Supervisor Lvl:

Salary Plan Information

Salary Admin Plan:

Grade:

Step:

Standard Hours:

0.00

Work Period:

USA

Save

Notify

Previous tab

Next tab

Add

Update/Display

Include History

Correct History

Description


Specific Information

Budget and Incumbents


DESCRIPTION PAGE

Position Information:

Effective Date – Identifies the date the position becomes effective. The system defaults in the system date (current date). Enter the date the new position will become effective.

Status – Indicates whether the status of the position is *Active* or *Inactive*. Select one of these values from the drop down selections by clicking .


Reason – Rationale for creating the new position. Since a new position is being created, the system defaults to *NEW*.

Position Status – Indicates whether the position is *Approved*, *Frozen*, or *Proposed*. Select one of these values from the drop down selections by clicking .

Status Date – Displays the date that a position first held a particular status value. Since this is a new position, the **Status Date** will be the same as the **Effective Date**. The system defaults the **Effective Date** in this field.

Job Information:

Business Unit – Will default to your Agency's BU.

Job Code – Enter the job code that this position is associated with, or select from the lookup page by clicking .

Once the **Job Code** information is entered, the following fields default from the Job Code table:

- **Reg/Temp** – Indicates whether this is a regular position or a temporary position.
- **Full/Part** – Indicates whether the position is full or part time.
- **Regular Shift** – Not currently used.
- **Union Code** – Not currently used.

Title - Defaults from the Job Code table.

Short Title - Defaults from the Job Code table.


Note: When the **Job Code** information is entered, the appropriate values for the **Title** and **Short Title** fields on the **Job Information** section default.



Work Location:

Regulatory Region – Defaults to *USA*.

Company – Enter *ND* for State of North Dakota.

Department – Enter the appropriate department code or select from the Lookup page by clicking .

Location Code – The location value may default after you have entered the **Department** field information. The location code identifies the physical location where the person who will occupy this position will work. Verify that the location code is correct or change if necessary.



Reports To - Not currently used.

Dot-Line - Not currently used.

Supervisor Lvl - Not currently used.

Salary Plan Information:

Salary Admin Plan, Grade, Standard Hours, Work Period – Indicates the salary components and hours for this position.

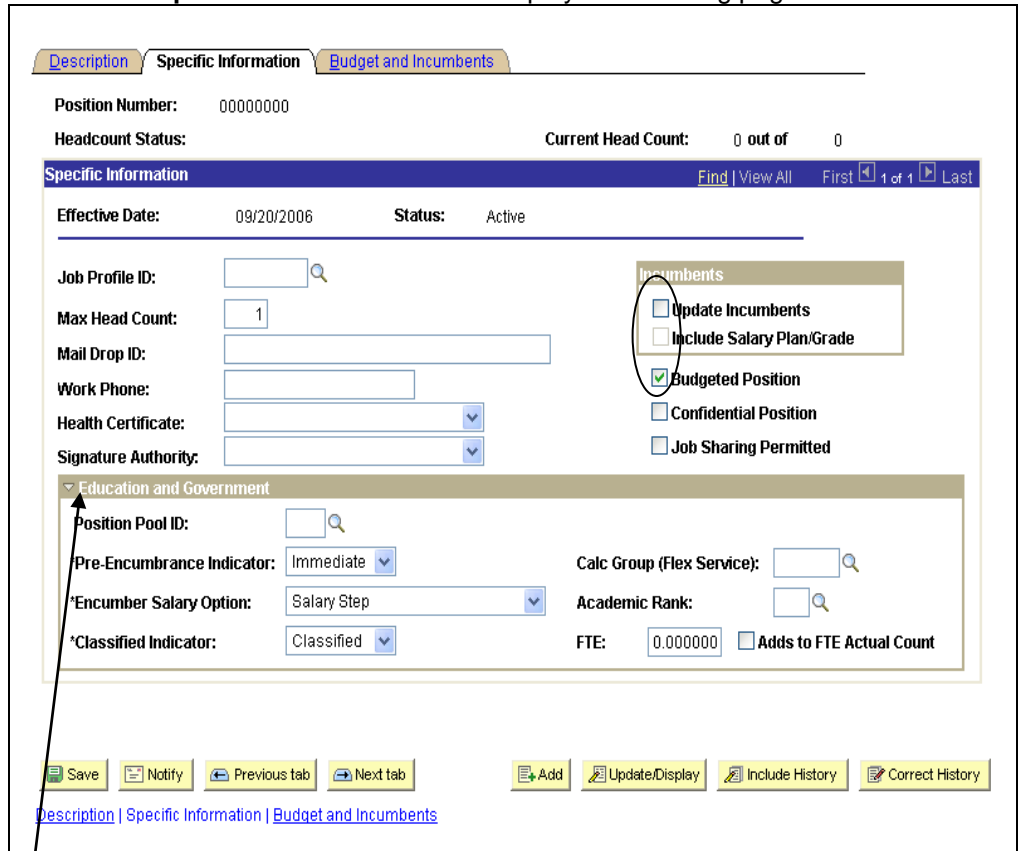
FLSA Status – Open the   **USA** and the following page will appear:

FLSA Status:	<input type="text" value="Nonexempt"/>		Bargaining Unit:	<input type="text"/>	
--------------	--	---	------------------	----------------------	---

FLSA Status – Choose the appropriate class from the drop down.

Bargaining Unit – Not currently used.


Click on the **Specific Information** tab to display the following page.



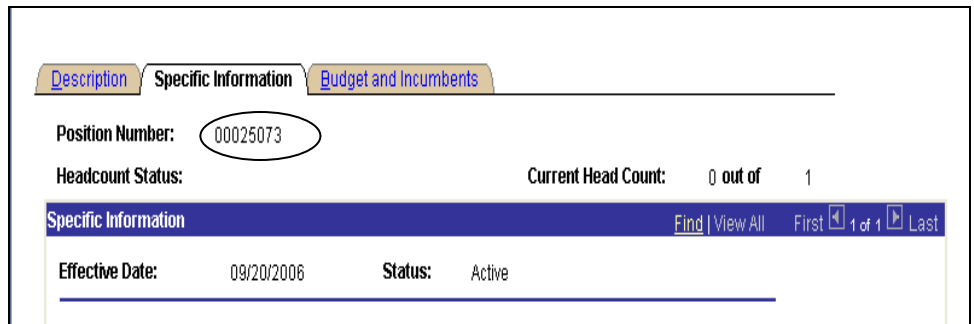
Need to Open Education and Government Section to view.

SPECIFIC INFORMATION PAGE

Ensure that the **Budgeted Position** checkbox is checked and the **Update Incumbents** checkbox is unchecked. The **Update Incumbents** checkbox should be unchecked since this is a new position and contains no incumbents.

Click  to save the new position in the system.

The Position Number field will be populated with the number that is assigned by the system.



[Description](#) [Specific Information](#) [Budget and Incumbents](#)

Position Number: 00025073

Headcount Status: Current Head Count: 0 out of 1

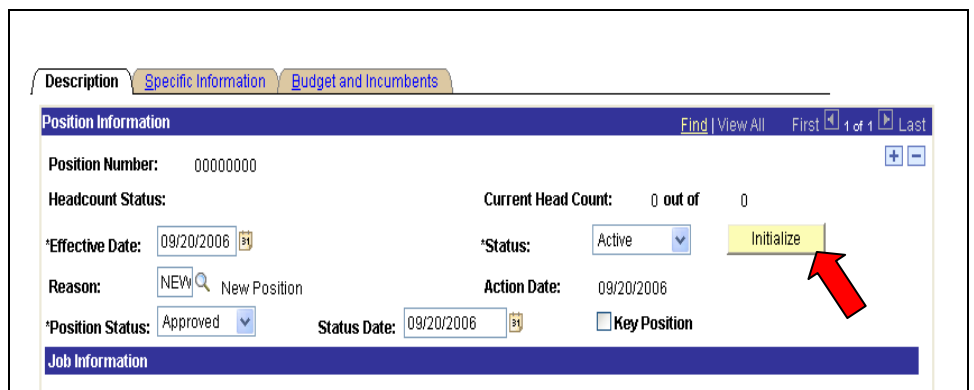
Specific Information Find | View All First 1 of 1 Last

Effective Date: 09/20/2006 Status: Active

COPYING FROM AN EXISTING POSITION

If you are creating a position that is similar to a position that already exists, you can copy existing position information into the new position.

To do this, add a position (as described previously) until you arrive at the **Position Information - Description** tab (shown below). On the **Description** page, you will see an **Initialize** button (indicated by the arrow).



[Description](#) [Specific Information](#) [Budget and Incumbents](#)

Position Information Find | View All First 1 of 1 Last

Position Number: 00000000

Headcount Status: Current Head Count: 0 out of 0

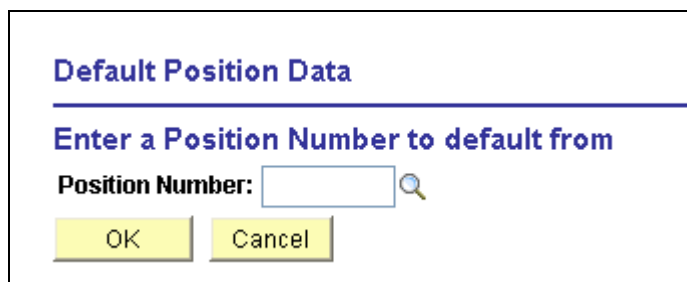
Effective Date: 09/20/2006 Status: Active Initialize

Reason: NEW New Position Action Date: 09/20/2006

Position Status: Approved Status Date: 09/20/2006 Key Position


Job Information

Click on the **Initialize** button and the following page will appear:



Default Position Data

Enter a Position Number to default from

Position Number: 

OK Cancel

Enter the position number you want to copy from into the **Position Number** field and click **OK**. The system automatically populates the position data components with the information from the position you have selected. Continue to add the position as described previously.

UPDATING POSITION DATA

To begin using the Position Information pages, use the following navigation path: **Main Menu > Organizational Development > Position Management > Maintain Positions Budgets > Add/Update Position Info**. The search page to find an existing position value will appear as described previously. Once you have selected the position number you wish to work with, the following page will appear.

Description

Specific Information

Budget and Incumbents

Position Information

Find | View All

First

1 of 1

Last

Position Number:

00025073

Current Head Count:

0 out of 1

Headcount Status:

Open

*Effective Date:

09/20/2006

*Status:

Active

Reason:

NEW

New Position

Action Date:

09/20/2006

*Position Status:

Approved

Status Date:

09/20/2006

☐ Key Position

Job Information

*Business Unit:

11000

Office of Mgrmt & Budget

Job Code:

CL0043

ADMIN ASSISTANT III

Manager Level:

All Other Positions

*Reg/Temp:

Regular

*Full/Part Time:

Full-Time

*Regular Shift:

N/A

Union Code:

Title:

ADMIN ASSISTANT III

Short Title:

ADMIN AST 3

[Detailed Position Description](#)

Work Location

*Reg Region:

USA

United States

Department:

110110

Office of Management & Budget

Company:

ND

State of North Dakota

Location:

11000

Office of Management & Budget

Reports To:

Dot-Line:

Supervisor Lvl:

Salary Plan Information

Salary Admin Plan:

CLSD

Grade:

008

Step:

Standard Hours:

40.00

Work Period:

W

Weekly

Mon

Tue

Wed

Thu

Fri

Sat

Sun

8.00

8.00

8.00

8.00

8.00

USA

Save

Return to Search

Notify

Previous tab



Next tab

Add

Update/Display

Include History

Correct History

Insert a new data row by clicking the  sign across from the **Position Number** field. After you click , a new data row will appear. Use this row to enter updated information for this position. An example is shown below.

Description

Specific Information

Budget and Incumbents

Position Information

Find | View All

First 1 of 2 Last

Position Number:

00025073

Headcount Status:

Open

Current Head Count:

0 out of 1

Effective Date:

09/20/2006

Status:

Active

Reason:

Action Date:

09/20/2006

Position Status:

Approved

Status Date:

09/20/2006

Key Position

Job Information

Business Unit:

11000

Office of Mgmt & Budget

Job Code:

CL0043

ADMIN ASSISTANT III

Manager Level:

All Other Positions

Reg/Temp:

Regular

Full/Part Time:

Full-Time

Regular Shift:

N/A

Union Code:

Title:

ADMIN ASSISTANT III

Short Title:

ADMN AST 3

Detailed Position Description

Work Location

Reg Region:

USA

United States

Department:

110110

Office of Management & Budget

Company:

ND

State of North Dakota

Location:

11000

Office of Management & Budget

Reports To:

Dot-Line:

Supervisor Lvl:

Salary Plan Information

Salary Admin Plan:

CLSD

Grade:

008

Step:

Standard Hours:

40.00

Work Period:

W

Weekly

Mon

Tue

Wed

Thu

Fri

Sat

Sun

8.00

8.00

8.00

8.00

8.00

USA

Save

Return to Search

Notify

Previous tab

Next tab

Add

Update/Display

Include History

Correct History

15





Notice, as indicated by the arrow on the right that you are now looking at 1 of 2 data rows. Also, as depicted by the arrow on the left, the **Reason** field is now blank.

The **Effective Date** field defaults to the current date (system date). Enter the date that the new position information is to take effect.



The following scenarios begin with the assumption you have already selected the position, inserted a new data row, and entered the appropriate effective date.

Note: The same Position Data pages that were used to add positions will be used in the following scenarios to update position information.




ACTION 1: UPDATE A POSITION

1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking  and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Verify that **Business Unit** is correct.
5. Enter the new job code in the **Job Code** field if appropriate. As is the case with adding new positions, the following fields default when the **Job Code** field is populated:
 - **Reg/Temp**
 - **Full/Part Time**
 - **Title and Short Title**
 - **Salary Admin Plan, Grade, Standard Hours, and Work Period**
6. Enter the new department information in the **Department** field if appropriate.
7. Enter the new work location information in the **Location** field if appropriate.
8. Open USA Flag, enter in **FLSA Status**.
9. Click on the **Specific Information** tab.
10. Click on the **Update Incumbents** box if you want the incumbent to be updated with the changes you made. Depending on the reason for the update, incumbents may, or may not, need to be updated. **Update Incumbents** automatically updates any changes made to the position directly to the job record of the person(s) assigned to the position.
11. Click on the **Include Salary Plan/Grade** box. This will automatically update the Grade on the incumbents record in Job Data.
12. Verify that the **Budgeted Position** box is checked.
13. Open **Education and Government** section, verify or change FTE.
14. Click on  to save the position data changes.

ACTION 2: RECLASSIFICATION / JOB CODE CHANGE

1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking  and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Verify that **Business Unit** is correct.
5. Enter the new job code in the **Job Code** field if appropriate. As is the case with adding new positions, the following fields default when the **Job Code** field is populated:
 - **Reg/Temp**
 - **Full/Part Time**
 - **Title and Short Title**
 - **Salary Admin Plan, Grade, Standard Hours, and Work Period**
6. Enter the new department information in the **Department** field, if appropriate.
7. Enter the new work location information in the **Location** field, if appropriate.
8. Open USA Flag, enter in **FLSA Status**.
9. Click on the **Specific Information** tab.
10. Click on the **Update Incumbents** box if you want the incumbent to be updated with the changes you made. Depending on the reason for the update, incumbents may, or may not, need to be updated. **Update Incumbents** automatically updates any changes made to the position directly to the job record of the person(s) assigned to the position.
11. Click on the **Include Salary Plan/Grade** box. This will automatically update the Grade on the incumbents record in Job Data.
12. Verify that the **Budgeted Position** box is checked.
13. Open **Education and Government** section, verify or change FTE.
14. Click on the **Budget and Incumbents** tab. Note the employee ID number of the incumbent.
15. Click on  to save the position data changes.

ACTION 3: TRANSFER POSITION

1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking  and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Enter new department information in the **Department** field if necessary.
5. Enter the new work location information in the **Location** field if necessary.
6. Verify that **Business Unit** and **Department** are correct.
7. Enter the new job code in the **Job Code** field. As is the case with adding new positions, the following information defaults on the page when the **Job Code** field is populated:
 - **Reg / Temp**
 - **Full / Part Time**
 - **Salary Admin Plan, Grade, Standard Hours, and Work Period**
8. Click on the **Specific Information** tab.
9. Click on (or ensure) that the **Update Incumbents** box is checked.
10. Click on the **Include Salary Plan/Grade** box. This will automatically update the Grade on the incumbents record in Job Data.
11. Click on .
12. If there is an incumbent in the position navigate to the **Job Data** pages by clicking **Main Menu** then using the following navigational path: **Workforce Administration > Job Information > Job Data**. Review, if changes need to be made add a row and make necessary changes.
13. Click on  to save your **Job Data** changes and complete the process.



HIRING AN EMPLOYEE

OVERVIEW

Essential employee data must be entered into the system before managing any human resource activity for employees. Once entered, you can input additional employee data and track a complete work history for each employee.

Many of the pages you will use when you hire an employee are the same pages you will use later to update information on existing employees.

The following is a summary of the components that are used during the hiring process. Most required fields *are preceded by an asterisk* in the system and must be filled in before saving the component.

To hire an employee you will progress through the **Personal Data, Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation** pages. ***DO NOT save your data until you have completed the full hire process – through the benefits program participation.***

You will then enter emergency contact, driver's license, worker's compensation and designated medical provider information. ***You will save your data after each component.***



The following tables describe the components of the hire process.

Page Name	Page Description
-----------	------------------

Personal Information

Name	Add or view name, date of birth, gender, highest education level, marital status, social security number.
Contact Information	Add or view address detail, phone numbers, and Email.
Regional	Regulatory region, ethnic group, military status, and citizenship proof.
Organizational Relationships	Employee, Contingent Worker or Person of Interest.

Job Data

Work Location	Payroll status, action / reason codes, job indicator, position number, company, business unit, department, and location.
Job Information	Job code, regular/temporary, full/part time, standard hours, FTE, work period, FLSA status, and work day hours.
Payroll	Pay group, holiday schedule, employee type, tax location code, and FICA status.
Salary Plan	Salary administration plan, grade, and grade entry date.
Compensation	Compensation rate frequency, rate code, and comp rate.

Employment Data

Organizational Instance	Original start date, last start date, first start date, termination date, org. instance service date.
Organizational Assignment Data	Last assignment start date, first assignment start date, assignment end date, company seniority date, benefits service date, seniority pay calc date, probation date, professional experience date, last verification date business title, and position phone.

Earnings Distribution

Job Earnings Distribution	Identifies job earnings distribution, earnings type, earnings code, and distribution percent.
---------------------------	---

Benefits Program Participation

Benefit Program Participation	Identifies the benefit program and the effective date.
-------------------------------	--

Workers Compensation

Worker's Compensation	Identifies worker's compensation code and percent.
-----------------------	--

Designated Medical Provider

Designated Medical Provider	Identifies employees preferred Designated Medical Provider
-----------------------------	--

Emergency Contact

Emergency Contact	Designates an emergency contact for the employee that includes the contact name, relationship, address, and phone numbers.
-------------------	--

Driver's License

Driver's License	Applicable for positions that operate motor vehicles. Includes the following information: driver's license number, state, issue location, issuing authority, valid from / to dates, number of violations and points, and the license type.
------------------	--



OBJECTIVES

At the completion of this section you will be able to hire an employee into the system by entering the following information:

- Personal data such as name, address, phone numbers, educational information, and social security number.
- Job data that includes the position, work location, and compensation.
- Earnings distribution information.
- Benefit program participation information.
- Worker's compensation information.
- Designated Medical Provider information.
- Emergency contact information.
- Driver's license information.

PREPARATION FOR HIRING AN EMPLOYEE

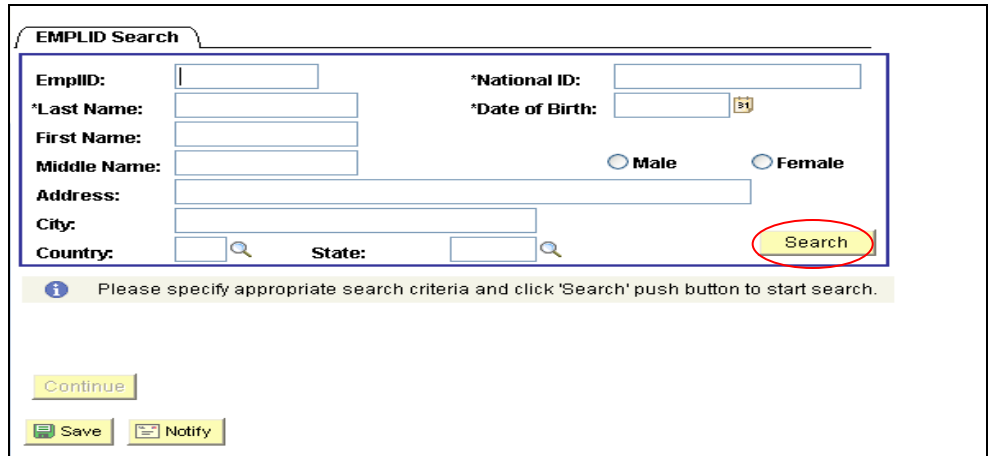
VERIFICATION OF POSITION INFORMATION

Since North Dakota is using position management functionality within PeopleSoft, it is imperative that all position data is correct. The hiring of a new employee is a good time to verify that the job information (department, job title, etc.) associated with a particular position is correct. To do this, see the Managing Positions Section of the manual.

NDHIRE


To begin the hiring process, navigate to the ND Hire page by using the following navigational path: **Main Menu > Workforce Administration > Personal Information > ND Hire.**

The system will display the following:



EMPLID Search

EmplID: *National ID:



*Last Name: *Date of Birth: 


First Name:

Middle Name: ☐ Male ☐ Female

Address:

City:

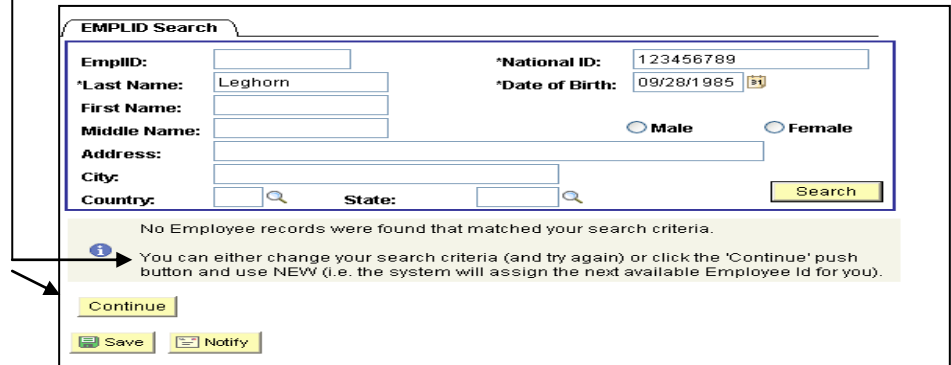
Country:  State:  **Search**

 Please specify appropriate search criteria and click 'Search' push button to start search.

Enter information for the new employee in the “ND Hire” screen. Last Name, National ID, and Date of Birth are required fields. (The ND Hire process matches one of the following or both: National ID **or** the Last Name and Date of Birth.) Click search.

You will get one of the following three results:

1) If no records are found (see below), click on Continue for the hire process.



EMPLID Search

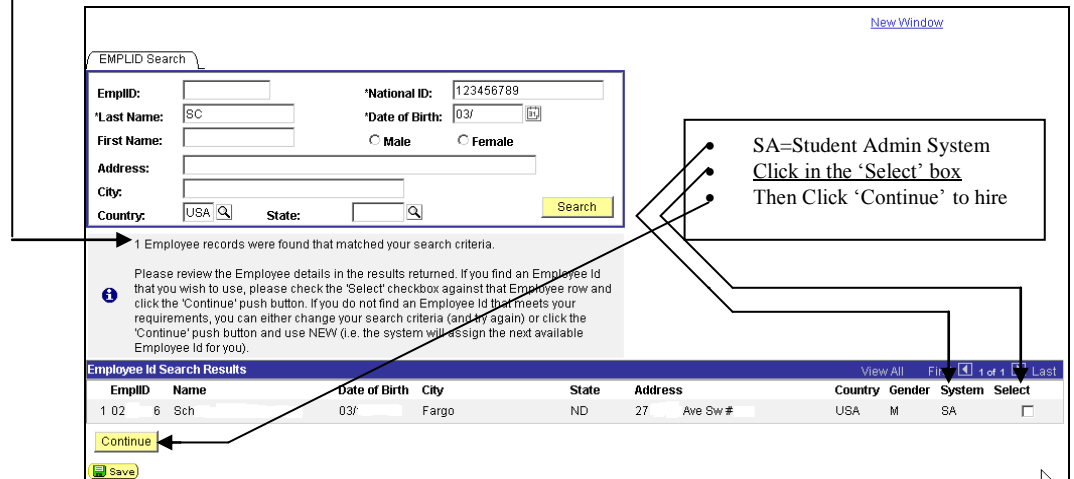
EmplID: *National ID: 123456789
 *Last Name: Leghorn *Date of Birth: 09/28/1985
 First Name: Male ☐ Female ☐
 Middle Name:
 Address:
 City:
 Country: State:

No Employee records were found that matched your search criteria.

You can either change your search criteria (and try again) or click the 'Continue' push button and use NEW (i.e. the system will assign the next available Employee Id for you).

This will take you to the Biographical Details screen.

2) If a matching record is found in the Student Admin (SA) System and **ONLY** the SA (System), you may then select the correct matching record and click 'Continue' to proceed through the hire process.



EMPLID Search

EmplID: *National ID: 123456789
 *Last Name: SC *Date of Birth: 03/
 First Name: Male ☐ Female ☐
 Address:
 City:
 Country: USA State:

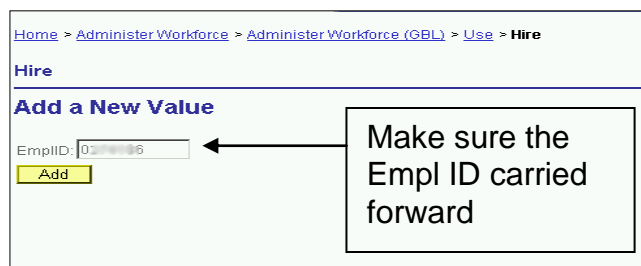
1 Employee records were found that matched your search criteria.

Please review the Employee details in the results returned. If you find an Employee Id that you wish to use, please check the 'Select' checkbox against that Employee row and click the 'Continue' push button. If you do not find an Employee Id that meets your requirements, you can either change your search criteria (and try again) or click the 'Continue' push button and use NEW (i.e. the system will assign the next available Employee Id for you).

EmplID	Name	Date of Birth	City	State	Address	Country	Gender	System	Select
1 02 6	Sch	03/	Fargo	ND	27 Ave Sw #	USA	M	SA	<input type="checkbox"/>

SA=Student Admin System
Click in the 'Select' box
Then Click 'Continue' to hire

The following screen shall appear:



Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire

Hire

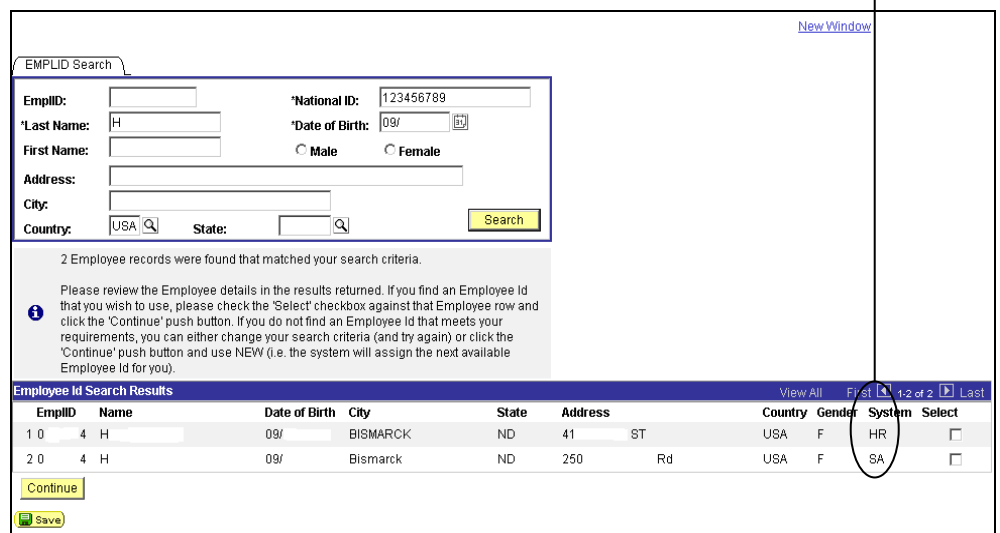
Add a New Value

EmplID: 02000006

Make sure the Empl ID carried forward

The employee id is brought in from the student administration system. You may click on add and proceed through the hire process.

3) Finally, if a matching record is found in the HR database (or both HR & SA as below), it will be necessary to switch to a Transfer, Re-Hire or Add Employment Instance process.



The screenshot shows the 'EMPLID Search' form with the following fields: EmplID, National ID (123456789), Last Name (H), Date of Birth (09/), First Name, Gender (Male/Female), Address, City, Country (USA), and State. A 'Search' button is present. Below the form, a message states: '2 Employee records were found that matched your search criteria. Please review the Employee details in the results returned. If you find an Employee Id that you wish to use, please check the 'Select' checkbox against that Employee row and click the 'Continue' push button. If you do not find an Employee Id that meets your requirements, you can either change your search criteria (and try again) or click the 'Continue' push button and use NEW (i.e. the system will assign the next available Employee Id for you).' Below this is a table titled 'Employee Id Search Results' with columns: EmplID, Name, Date of Birth, City, State, Address, Country, Gender, System, and Select. The table contains two rows. The first row has EmplID 104, Name H, Date of Birth 09/, City BISMARCK, State ND, Address 41 ST, Country USA, Gender F, System HR, and a Select checkbox. The second row has EmplID 204, Name H, Date of Birth 09/, City Bismarck, State ND, Address 250 Rd, Country USA, Gender F, System SA, and a Select checkbox. A 'Continue' button is below the table, and a 'Save' button is at the bottom left. A 'New Window' link is in the top right corner.

EmplID	Name	Date of Birth	City	State	Address	Country	Gender	System	Select
104	H	09/	BISMARCK	ND	41 ST	USA	F	HR	<input type="checkbox"/>
204	H	09/	Bismarck	ND	250 Rd	USA	F	SA	<input type="checkbox"/>

For rehires, transfers, refer to the Maintaining Employee Information section of this manual and/or the appropriate checklists.

PERSONAL INFORMATION




The Personal Information pages are used to record and access personal information about employees. The Personal Information pages include the following: **Biographical Details**, **Contact Information**, **Regional** and **Organizational Relationships**. Many components and processes elsewhere within PeopleSoft reference the data stored on the Personal Information pages.


The **Biographical Details** page will appear as shown below.

Biographical Details [Contact Information](#) [Regional](#) [Organizational Relationships](#)

Person ID: NEW


Primary Name Find | View All First 1 of 1 Last


*Effective Date: 09/21/2006   


*Format Type: English 


Display Name: [Add Name](#)

Biographic Information




Date of Birth:  0 Years 0 Months


Birth Country: USA  United States


Birth State: 



Birth Location:  Waive Data Protection ☐


Biographical History Find | View All First 1 of 1 Last


*Effective Date: 09/21/2006   

*Gender: Unknown 

*Highest Education Level: A-Not Indicated 




*Marital Status: Single  As of: 

Language Code: 

Alternate ID: 

☐ Full-Time Student

National ID Customize | Find | View All First 1 of 1 Last

*Country	*National ID Type	National ID	Primary ID
USA 	Social Security Number 		<input checked="" type="checkbox"/>


Save Notify Previous tab Next tab Refresh Add Update/Display Include History Correct History



[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)


Click on Add Name, this page will appear.


Edit Name


English Name Format

Prefix: 

First Name:  Middle Name: 

Last Name: 

Suffix: 

 Display Name:

Formal Name:

Name:

When done adding name click OK and you will go back to the Biographical Details.

OK Cancel Refresh



PRIMARY NAME


Note: Use mixed case for all data entries. The PeopleSoft system is case sensitive.

Person ID – This is the employee identification number assigned by PeopleSoft. The ID number will appear as *NEW* as you begin the hiring process. This will change after you complete the Biographical Details and click on Add a Relationship.


Effective Date – Enter the employee's hire date. This defaults to the current date. If the hire date is a date other than the default date, you can change it appropriately.

Format Type – Defaults to *English*.

Add Name – Click on this.

Prefix – Click on the  to choose a pre-defined prefix title. Options include *Dr, Miss., Mr., Mrs., Ms..*

First Name, Middle Name and Last Name – Enter the employee's name in the fields. (Mixed case)

Suffix – Click on the  to choose a pre-defined suffix from the Lookup page. Options include *Jr., Sr., etc.*

Click OK – return to Biographical Details

Note: PeopleSoft enters the employee's name in the **Name** field after **First Name, Middle Initial** and **Last Name** have been entered. PeopleSoft only requires that a first and last name be entered. Prefix, middle name or initial, and suffix is optional.

Date of Birth – Enter the employee's date of birth. The system references this field for certain calculations in the Base Benefits and

Payroll modules. Once you enter a birth date, the system calculates the person's age in years and months.

The **Birth Country**, **Birth State**, and **Birth Location** are for information only and should be filled in, if known.

BIOGRAPHICAL HISTORY:

Effective Date: This defaults to the current date. Enter the employees hire date. If the hire date is a date other than the default date, you can change it appropriately.

Gender – The field defaults to *Unknown*. Click the  to select either *Male* or *Female*.

The **Highest Education Level** field is mandatory. Select the appropriate option from the drop down list.

Marital Status - This field is for the employee's actual marital status (not their tax status).

As of – If known you may complete.

Language Code: Not currently being used. It is the employee's native or preferred language.

Alternate Employee ID: Not currently being used. This field is to record a second type of ID for an employee, Do NOT put the SSN in here.

Full Time Student: Informational only.

NATIONAL ID:

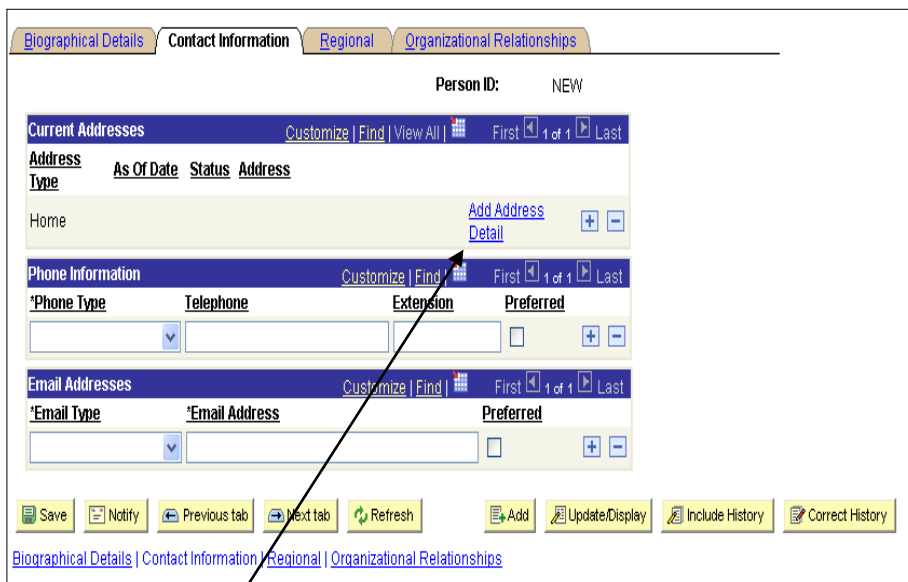
Country – Defaults to *USA*.

National ID Type Description – Defaults to *Social Security Number*.

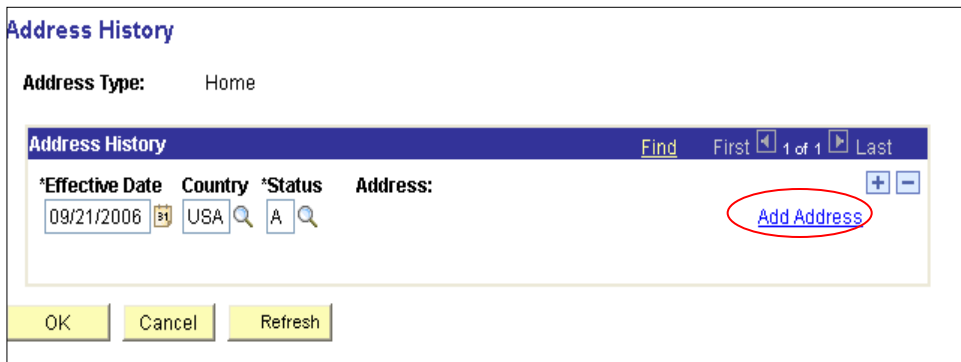
National ID (Social Security Number) – Enter the Social Security Number. It is not necessary to include punctuation; the number is formatted by the system.

Primary ID – Defaults to checked.

Click on **Contact Information** and the following screen will appear:



Click on Add Address Detail and the following screen will appear:



Address Type – The system defaults to Home address. Record the employee's home address. The system uses the home address stored here when printing all correspondence (e.g. Paychecks, Mailing Labels, etc.). Each employee must have a home address. The mailing address may be entered here by inserting a row. However, if the employee wants their check mailed to a different address than their home address, entering a mailing address here does not override the home address. You must indicate the check address in Payroll Options.

Country – Defaults to *USA*.

Status – Defaults to A (Active)

Click on **Add Address** and the following screen will appear:


Edit Address

Country: United States

Address 1:

Address 2:

Address 3:

City: State:  Postal:

County:




Address 1 – Enter the employee’s street address.


The **Address 2** and **Address 3** fields are optional. These fields may be used to store additional address data (e.g. Apartment Number, or “Care Of...” notations).

City, State, Postal and **County** – Enter information as appropriate. The **Postal** field is used for the employee’s zip code.

Click OK and OK, this will take you back to **Contact Information**.


To enter phone numbers, go down to the **Phone Information** section.

Phone Information				Customize Find 	First  1 of 1  Last
*Phone Type	Telephone	Extension	Preferred		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Phone Type – Select the appropriate phone type by clicking the  at the right of the field.


Business – This is the employees work telephone number. This is the information that is pulled into the LDRPS file.

Telephone – Enter the phone number. The system automatically formats the number; the phone format is populated by default with 000/000-0000.


To enter additional phone numbers, click on the  (as indicated by the arrow in the above screen shot).

If you wish to enter an email address, go down to the **Email Addresses** section.




















Email Addresses			Customize	Find	First	1 of 1	Last
*Email Type	*Email Address	Preferred					
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>					
		<input type="button" value="+"/>	<input type="button" value="-"/>				

Email Type – Select the appropriate value from the available options by clicking the  at the right of the field.

Email Address – Enter the appropriate email address.

To enter additional email addresses, click on the .

Click the **Regional** tab and the following page will be displayed.

Biographical Details	Contact Information	Regional	Organizational Relationships																																			
<p>Person ID:</p> <p>▼  USA</p>																																						
<table border="1"> <thead> <tr> <th colspan="2">Ethnic Group</th> <th>Find</th> <th>View All</th> <th>First</th> <th>1 of 1</th> <th>Last</th> </tr> </thead> <tbody> <tr> <td>Regulatory Region:</td> <td>USA </td> <td>United States</td> <td>Ethnic Group:</td> <td><input type="text"/></td> <td></td> <td><input type="button" value="+"/></td> </tr> <tr> <td colspan="5"></td> <td><input type="button" value="-"/></td> <td><input type="checkbox"/> Primary</td> </tr> </tbody> </table>				Ethnic Group		Find	View All	First	1 of 1	Last	Regulatory Region:	USA 	United States	Ethnic Group:	<input type="text"/>		<input type="button" value="+"/>						<input type="button" value="-"/>	<input type="checkbox"/> Primary														
Ethnic Group		Find	View All	First	1 of 1	Last																																
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<table border="1"> <thead> <tr> <th colspan="2">Smoker History</th> <th>Customize</th> <th>Find</th> <th>First</th> <th>1 of 1</th> <th>Last</th> </tr> </thead> <tbody> <tr> <td>*Smoker</td> <td>*As of</td> <td colspan="5"></td> </tr> <tr> <td>1 <input type="text"/></td> <td><input type="text"/></td> <td></td> <td colspan="4"><input type="button" value="+"/></td> </tr> <tr> <td colspan="2"></td> <td colspan="5"><input type="button" value="-"/></td> </tr> </tbody> </table>				Smoker History		Customize	Find	First	1 of 1	Last	*Smoker	*As of						1 <input type="text"/>	<input type="text"/>		<input type="button" value="+"/>						<input type="button" value="-"/>											
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*Smoker	*As of																																					
1 <input type="text"/>	<input type="text"/>		<input type="button" value="+"/>																																			
		<input type="button" value="-"/>																																				
<p> <input type="button" value="Save"/> <input type="button" value="Notify"/> <input type="button" value="Previous tab"/> <input type="button" value="Next tab"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/> </p> <p> Biographical Details Contact Information Regional Organizational Relationships </p>																																						

USA:

Regulatory Region – Defaults to USA.

Ethnic Group – Choose the appropriate option from the drop down list.

Effective Date – Date of hire.

Date Entitled to Medicare - Not currently being used.

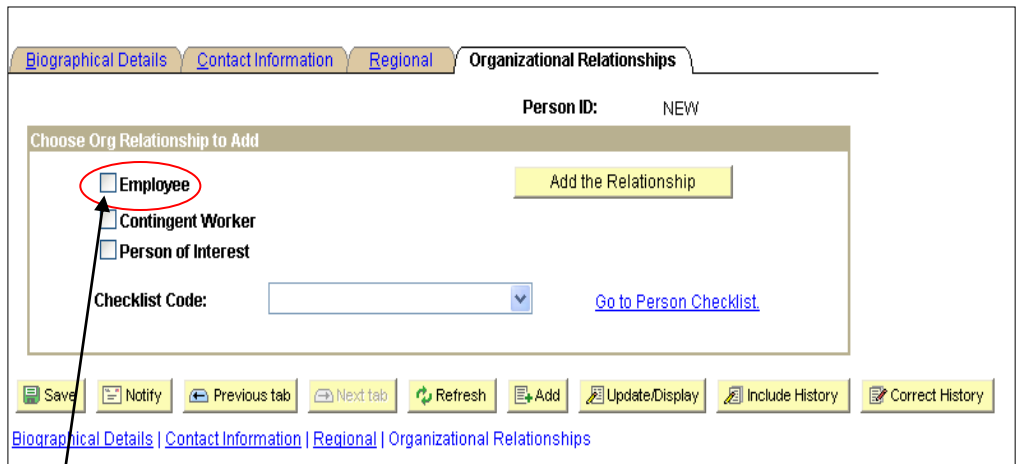
Military Status - Select appropriate option from the drop down list.

Citizenship Proof 1 and Citizenship Proof 2 - Record forms of identification to prove employee's eligibility to work in the US (I-9 form).

Eligible to Work in US – Default is checked.

Smoker: Informational only.

Click on **Organizational Relationships** and the screen below will appear:



Check the box by Employee

Click on **Add the Relationship** button – This will take you to the Work Location Screen. **Note: At this time you will have the ID number for your new employee.**

Once you click the Add the Relationship button, the **Work Location** page will be displayed.

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WORK LOCATION PAGE

Effective Date – The effective date defaults from the **Personal Information** pages.

Effective Sequence – For the new hire row this value will always default to 0 (zero).


Job Indicator – This defaults to *Primary* for new hires.

Action – Defaults to *Hire* for new employees.













Reason – This will be Hire.

Last Start Date – This will fill in with the hire date after being saved.

Expected Job End Date – Not currently being used.

Position Number – Enter the position number that is on the requisition or select a position number from the position lookup page by clicking on  beside the **Position Number** field. The system displays the following lookup page.

Look Up Position Number

Position Number:	begins with 	<input type="text"/>
Description:	begins with 	<input type="text"/>
Business Unit:	begins with 	<input type="text"/> 
Department:	begins with 	<input type="text"/> 
Job Code:	begins with 	<input type="text"/> 
Position Status:	= 	<input type="text"/> 
Job Sharing Permitted	<input type="checkbox"/>	
Reports To Position Number:	begins with 	<input type="text"/> 

[Basic Lookup](#)

Enter information in one of the fields in which you would like to search by and click **Lookup**. Click on the appropriate position and the system populates the **Position Number** field with your selection.

When you tab out of the **Position Number** field, the system automatically fills in the **Position Entry Date** field with the hire date. The system populates several fields from the Position Data table. This is why verifying that the position data is correct before beginning the hiring process is so important

When a **Position Number** is input, the following fields populate on the **Work Location** page:

- **Regulatory Region** – Defaults to *USA*.
- **Company** – Defaults to *ND*.
- **Business Unit** – Defaults to *your business unit*.
- **Department** – Defaults to the department to which the employee belongs.
- **Department Entry Date** (to the right of **Department**) – Indicates the date on which the employee begins work for this department.
- **Location** – Defaults the code used to identify the physical location where the employee will be performing their job.
- **Establishment ID** – Not currently used.

Note: There may be instances in which the defaulted information from the position number in the above fields is not correct. The information should be corrected in position management where possible. If the information in position management does not pertain to all the employees in that position (ex. temporary positions) you may click on the override position data button which will open up these fields for entry. It is very important that you click on the override position data button when you are finished to close these fields again. **If you don't close these fields, the link between position data and job data is broken.**



Click the **Job Information** tab and the following page will appear.

Work Location		Job Information		Job Labor	Payroll	Salary Plan	Compensation
Happy Camper		EMP		ID:	7012068		Empl Rcd #: 0
Job Information Find First 1 of 1 Last							
Effective Date:	09/01/2006		Effective Sequence:	0		Job Indicator:	Primary Job
Action / Reason:	Hire		Hire		Current		
Job Code:	CL0819		TRAINING OFFICER II		Entry Date:	09/01/2006	
Supervisor Level:							
Supervisor ID:							
Reports To:							
Regular/Temporary:	Regular		FullPart:	Full-Time			
Empl Class:	<input type="text"/>		*Officer Code:	<input type="text"/>			
Regular Shift:	N/A		Shift Rate:	<input type="text"/>			
Classified Indc:	Classified						
Standard Hours							
Standard Hours:	40.00						
Work Period:	W Weekly						
FTE:	1.000000 <input checked="" type="checkbox"/> Adds to FTE Actual Count? <input type="checkbox"/> Encumbrance Override						
Contract #							
Contract Number:	<input type="text"/>			Contract Type:			
<input type="button" value="Next Contract Number"/>							
▼ USA							
FLSA Status:	Nonexempt		*EEO Class:	<input type="text"/>		Work Day Hours:	<input type="text"/>
Job Data Employment Data Earnings Distribution Benefits Program Participation							
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/> <input type="button" value="Previous tab"/> <input type="button" value="Next tab"/> <input type="button" value="Refresh"/>							
Work Location Job Information Job Labor Payroll Salary Plan Compensation							

JOB INFORMATION PAGE

The following fields populate from the **Position Number** entered on the previous page:

- **Job Code** – Identifies the job the employee performs.
- **Entry Date** – Indicates the date the employee begins work in this job.
- **Supervisor Level** – Not currently being used.
- **Supervisor ID** – Not currently being used.
- **Reports To** – Not currently being used.

- **Regular/Temporary and Full/Part (Time)** – Defines the type of employment.
- **Empl Class** – Not currently being used.
- **Officer Code** – Defaults to *None*.
- **Regular Shift** – The State of North Dakota is not using **Regular Shift**.
- **Shift Rate** – The State of North Dakota is not using the **Shift Rate** fields for tracking information. Shift information is entered on the payline.
- **Classified Indc** - Defaults from position data as to what type of position this is.

Standard Hours – The number of hours per week that the employee will work. A value defaults from the position.

Work Period – The standard time period in which employees must complete the standard hours. This should always be W for Weekly.

FTE – Is defaulted according to the employee's standard hours.
(Example: If the standard hours are 20, the FTE will be .5)

Contract Number – Not currently being used.

To access the **FLSA Status** and **EEO Class** fields, click on  **USA** to expand the section.

FLSA Status – The system fills in this field based on the job code assigned to this employee. FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Benefits Administration.

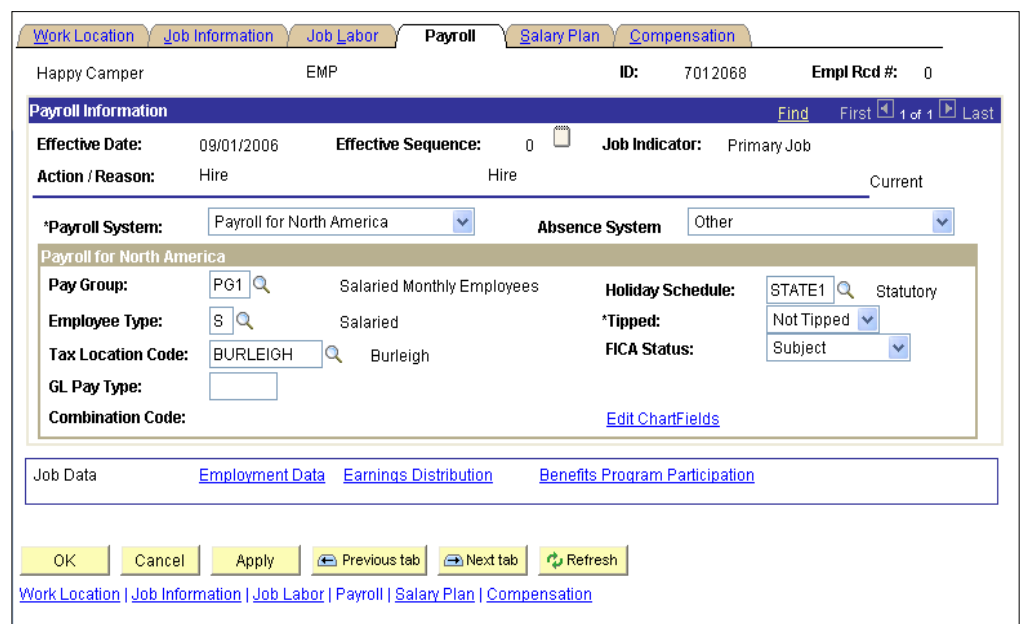
EEO Class – Not currently being used. Should default to none.

Work Day Hours – Workday hours are standard hours divided by 5. Only required if FLSA status is nonexempt. (Example: If standard hours are 40, the work day hours should be 8.)

Note: There may be instances in which the defaulted information from the position number in the above fields is not correct. The information should be corrected in manage positions where possible. If the information in manage positions does not pertain to all the employees in that position (ex. temporary positions) you may click on the override position data button which will open up these fields for entry. It is very important that you click on the override position data button when you are finished to close these fields again. If you don't close these fields, the link between position data and job data is broken.

Note: The Job Labor tab is NOT used.

Click the **Payroll** tab and the following page will appear.



Happy Camper EMP ID: 7012068 Empl Rcd #: 0

Payroll Information Find First 1 of 1 Last

Effective Date: 09/01/2006 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Hire Hire Current

*Payroll System: Payroll for North America Absence System: Other

Payroll for North America

Pay Group: PG1 Salaried Monthly Employees Holiday Schedule: STATE1 Statutory

Employee Type: S Salaried *Tipped: Not Tipped

Tax Location Code: BURLEIGH Burleigh FICA Status: Subject

GL Pay Type:

Combination Code: [Edit ChartFields](#)


Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

OK Cancel Apply Previous tab Next tab Refresh

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

PAYROLL PAGE

Payroll System – Defaults to *Payroll for North America*.

Pay Group – Enter the pay group or click on  to list the pay group codes. Once the pay group has been entered, the following information defaults:



State of North Dakota

Holiday Schedule – Identifies the paid holidays for which an employee is eligible. Need to verify that the default is correct for that employee.

- **State1** is the statutory holidays.
- **None** is no holidays.
-

Employee Type – Records how the employee reports time. Examples would be Hourly or Salaried. Need to verify that the default is correct for the employee.

Tipped – This is currently not being used.

Tax Location Code – List the code used to identify the county in which the employee works.

FICA Status– Indicates whether the employee is exempt, subject, or subject to Medicare only. This field defaults to *Subject*.

GL Pay Type- North Dakota is not using this field. Leave this field blank.

Combination Code - North Dakota is not using this field. Leave this field blank.

Click on the **Salary Plan** tab and the following page will appear.

The screenshot shows the 'Salary Plan' tab selected in a web application. The form displays employee information: 'Happy Camper', 'EMP', 'ID: 7012068', and 'Empl Rcd #: 0'. Below this, the 'Salary Plan' section includes fields for 'Effective Date: 09/01/2006', 'Effective Sequence: 0', 'Job Indicator: Primary Job', and 'Action / Reason: Hire'. The 'Salary Administration' section contains 'Plan: CLSD', 'Grade: 012', 'Grade Entry Date: 09/01/2006', 'Includes Wage Progression Rule' (unchecked), 'Step: ', and 'Step Entry Date: '. At the bottom, there are navigation links: 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. A footer bar contains buttons for 'OK', 'Cancel', 'Apply', 'Previous tab', 'Next tab', and 'Refresh', along with a breadcrumb trail: 'Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation'.

SALARY PLAN PAGE

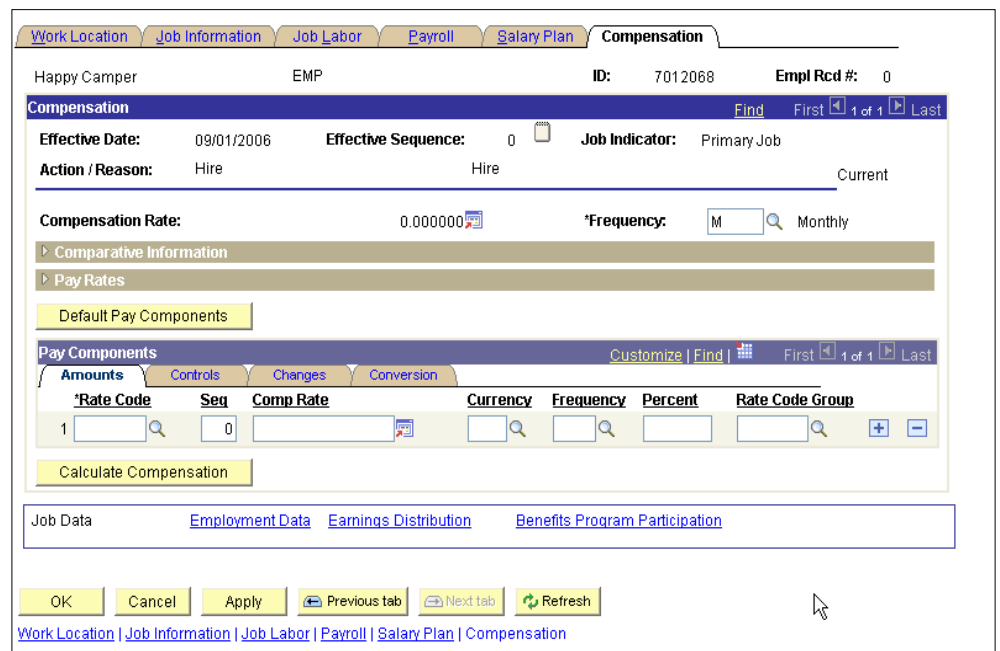
Salary Administration Plan & Grade – Used to tie together a collection of salary grades for which groups of similar employees will be eligible. These fields default from **Position Information**.

Grade Entry Date – Indicates the date on which the employee is first compensated from the **Salary Grade**.

Step – Is not being used at this time.

Step Entry Date - Is not being used at this time.

Click on the **Compensation** tab and the following page will appear.



Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Happy Camper EMP ID: 7012068 Empl Rcd #: 0

Compensation Find First 1 of 1 Last

Effective Date: 09/01/2006 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Hire Hire Current

Compensation Rate: 0.000000 *Frequency: M Monthly

Comparative Information

Pay Rates

Default Pay Components

Pay Components Customize Find First 1 of 1 Last

Amounts Controls Changes Conversion

*Rate Code	Seg	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1	0					

Calculate Compensation

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

OK Cancel Apply Previous tab Next tab Refresh

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

COMPENSATION PAGE

Comp Frequency - Defaults to *M* for Monthly or *H* for Hourly.

Rate Codes – Choose from search list. (NAANNL does not apply to the State.) The description will indicate which rate code to use.



1. *Compensation:* Enter compensation amount if not defaulted from the rate code.
2. *Currency:* Defaults to USD (US Dollars).
3. *Frequency and Percent:* Defaults from rate code.
4. *Rate Code Group:* Not currently being used.

Click on Calculate Compensation button.

EMPLOYMENT DATA

Click on the [Employment Data](#) hyperlink to continue the hiring process and enter Employment Data information.

When you click on the [Employment Data](#) hyperlink, the following page will appear.

Employment Information									
Happy Camper		EMP		ID:	7012068		Empl Rcd #:		0
Organizational Instance									
Organizational Instance Rcd:	0		Original Start Date:				<input type="checkbox"/> Override		
Last Start Date:			First Start Date:						
Termination Date:				Years	Months	Days			
Org Instance Service Date:			<input type="checkbox"/> Override	0	0	0			
Organizational Assignment Data									
Instance Record									
Last Assignment Start Date:	10/21/2006			First Assignment Start:	10/21/2006				
Assignment End Date:									
Home/Host Classification:	Home			Years	Months	Days	Time Reporter Data		
Company Seniority Date:			<input type="checkbox"/> Override	0	0	0			
Benefits Service Date:			<input type="checkbox"/> Override	0	0	0			
Seniority Pay Calc Date:	10/21/2006		<input type="checkbox"/> Override	0	0	0			
Probation Date:	<input type="text"/>								
Professional Experience Date:	<input type="text"/>			Last Verification Date:	<input type="text"/>				
Business Title:	TRAINING OFFICER II			Position Phone:					
▶ USA									
<div>Job Data Employment Data Earnings Distribution Benefits Program Participation</div>									
<div>OK Cancel Apply Refresh</div>									

EMPLOYMENT INFORMATION PAGE

The **Employment Information** components are used to record employment information such as business title and position phone.

Organizational Instance Section – This information will populate when saved. The Original Start Date, the Last Start Date, the First Start Date and the Org Instance Service Date will all be the hire date.

Termination Date - The system displays this date from the Job Data component when an employee terminates.

Last Assignment Start Date – This will change to the hire date after being saved.

Assignment End Date – Not currently being used.

***Home/Host** – Defaults to *Home*.

Company Seniority Date – Defaults to the hire date when the record is saved. The **Company Seniority Date** is the continuous service date and is used for service award recognition. Once the record is saved you can go back in and change this date by clicking on the Override button next to the date; change the date and then save. Leave the box checked next to override.

Benefits Service Date - This is used for leave accrual. If the hire date is not the first of the month, you should enter the first day of the month of the hire to accrue the appropriate accrual of leave hours. Do this by clicking on the Override button next to the date; change the date and then save. Leave the box checked next to override.


Seniority Pay Calc Date - This will change to the hire date after being saved. We currently are not using this date.

Probation Date – Enter the end date of the new employee's probation/provisional period.

Professional Experience Date - We currently are not using this date.

Last Verification Date – Displays the latest date on which the worker verified his or her personal data in the system. This is not currently being used.

Business Title – Defaults from Position Data.

Note: If you are hiring a temporary/seasonal employee, click the  **USA** to expand the section as shown below.

USA

Security Clearance:

☐ Owns 5% (or More) of Company

Appointment End Date:

☐ Accrue Tenure Services

Service Calculation Group:

Contract Length:

Not Applicable

FTE for Tenure Accrual:

FTE for Flex Service Accrual:

Appointment End Date – Enter the expected end date for the temporary/seasonal position.

JOB EARNINGS DISTRIBUTION

Click on the [Earnings Distribution](#) hyperlink to continue the hiring process.

When you click on the [Earnings Distribution](#) hyperlink, the following page will appear.

Job Earnings Distribution

Happy Camper

EMP

ID: 7012068

Empl Rcd #: 0

Earnings Distribution Type

Find First 1 of 1 Last

Effective Date:

09/01/2006

Effective Sequence:

0

Job Indicator:

Primary Job

Action / Reason:

Hire

Hire

Current

Standard Hours:

40.00

Work Period:

W Weekly

Compensation Rate:

3,500.000000

Comp Freq:

M Monthly

*Earnings Distribution Type:

None

Job Earnings Distribution

Find First 1 of 1 Last

Position

Unit

Department

Job Code

Shift

Regular

*Earn Code

GL Pay Type

Compensation Rate

Std Hrs

Distrib %

S01

Earnings Chartfields

Combination Code:

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

OK

Cancel

Apply

Refresh

44

JOB EARNINGS DISTRIBUTION PAGE

The Job Earnings Distribution earnings code will need to be verified for each employee.

Please verify the following:

1. The earnings code for the PG1(& MJ1) pay group for salaried employees is defaulted to earnings code S01 for regular earnings. If the employee is to receive temporary earnings, the earnings code needs to be changed to S02 for temporary earnings on the job earnings distribution page.
2. The earnings code for the PG2 pay group for hourly employees is defaulted to earnings code S02 for temporary earnings. If the employee is to receive regular earnings, the earnings code needs to be changed to S01 for regular earnings on the job earnings distribution page.
 - If the defaulted information is correct, you do not have to change anything.
 - If the earnings code needs to be changed, you need to do the following:
 - Earnings Distribution Type – Select by percent.
 - Earn Code – Change to proper earnings code (S01 or S02)
 - Distrib – type is 100% for distribution.

This will ensure that your employee's salary for hourly base pay is paid using the correct earnings code.

BENEFITS PROGRAM PARTICIPATION

Click on the [Benefit Program Participation](#) hyperlink to continue the hiring process and enter Benefit Program Participation data.

The **Benefit Program Participation** page specifies the benefit program the new employee is enrolling in.

When you click on the [Benefits Program Participation](#) hyperlink, the following page will appear.

Benefit Program Participation

Happy CamperEMPID: 7012068Empl Rcd #: 0

Benefit Record Number: 0

Benefit Status

FindFirst1 of 1Last

Effective Date: 09/01/2006Effective Sequence: 0

Action / Reason: HireHire

Current

Benefits System: Benefits AdministrationBenefits Employee Status: Active

Annual Benefits Base Rate: USD

Benefits Administration Eligibility

BAS Group ID: 110Office of Mgmt & Budget

Elig Fld 1: 11000Elig Fld 2: CL0819Elig Fld 3:

Elig Fld 4:Elig Fld 5:Elig Fld 6:

Elig Fld 7:Elig Fld 8:Elig Fld 9:

Benefit Program Participation

FindView AllFirst1 of 1Last

Effective Date: 09/01/2006Benefit Program: SA1State Regular EmployeesCurrency Code: USD

[Job Data](#)[Employment Data](#)[Earnings Distribution](#)Benefits Program Participation

OKCancelApplyRefresh

BENEFIT PROGRAM PARTICIPATION PAGE


Benefits System – Defaults to *Benefits Administration*.

BAS/Group ID – Verify that this is the correct Business Unit.

Effective Date – The date the benefit program will take effect for the new employee. (This will most likely be the employee's hire date.)

Benefit Program – The appropriate benefit program will populate from the Position Information.

Benefit Program Name	Description
SA1	Regular Employees
SA3	Temporary Employees
SA4	Legislators
SA5	State Active Duty

Click  to save all data entered. Once done this will take you back to the biographical information page. You can now continue to add Emergency Contacts, Worker's Compensation, Designated Medical Provider and Driver's License information as described in the following pages.

Note: You may want to make note of the employee ID number the system has assigned the new employee. You may need this number to initiate the Emergency Contact, Worker's Compensation, Designated Medical Provider and Driver's License data entry processes.

EMERGENCY CONTACT

To enter an employee's emergency contact information, click on **Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact** and the screen below will appear.

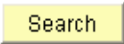
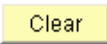

Emergency Contact

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID:	begins with	7011953
Name:	begins with	
Last Name:	begins with	
Second Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

☐ Case Sensitive



[Basic Search](#)

[Save Search Criteria](#)

Input the EmplID and click Search. The following screen will appear.

Contact Address/Phone

Other Phone Numbers

Walleye Fisherman

Person ID: 7011953

Emergency Contact

Find | View All | First 1 of 1 | Last

*Contact Name:

*Relationship to Employee:

Other

☐ Primary Contact

☐ Same Address as Employee

☐ Same Phone as Employee

Contact Address

Country:

USA

United States

Address:

[Edit Address](#)

Contact Phone

Phone:


Save

Return to Search

Notify

[Contact Address/Phone](#) | [Other Phone Numbers](#)

Contact Name – Enter the name (last name, first name) of the emergency contact person (mixed case).

Relationship to Employee – Click the  to select the appropriate value from the drop down selections.

Primary Contact – Click the box if this person will be the primary emergency contact.

If the contact person has the same address and phone number as the new employee, check the **Same Address/Phone as Employee** box. If not, enter the address information as appropriate.

Phone – Enter the phone number for the emergency contact person.

If you need to enter additional phone numbers for the contact person, click the **Other Phone Numbers** tab to display the page.

Contact Address/Phone

Other Phone Numbers

Walleye Fisherman

Person ID: 7011953

Emergency Contact

Find | View All

First 1 of 1 Last

+

-

Contact Name:
 Relationship to Employee: Other
 ☐ Primary Contact

Other Phone Numbers for Emergency Contact

Find | View All

First 1 of 1 Last

+

-

Phone Type

Phone

+


-

Save

Return to Search

Notify

[Contact Address/Phone](#) | [Other Phone Numbers](#)

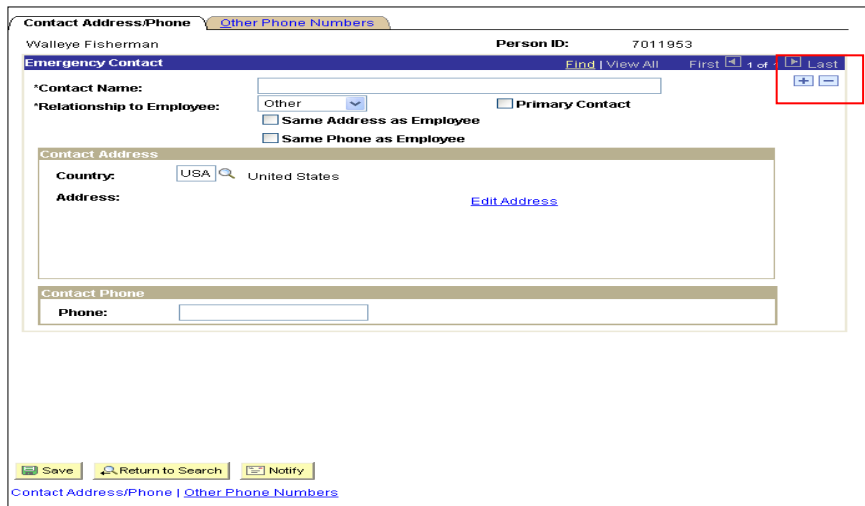
Phone Type – Click the  to select the type of phone number (e.g. cellular, pager, etc.) from the drop down selections.

Phone – Enter the phone number for the type selected.

If you are finished entering contact information, click .

ENTERING ADDITIONAL EMERGENCY CONTACTS

To enter additional emergency contacts, click on the **+** across from the **Contact Name** field. A new emergency contact record will appear *below* the original as shown in the following screen shot. Complete information.



Contact Address/Phone | **Other Phone Numbers**

Walleye Fisherman | Person ID: 7011953

Emergency Contact | Find | View All | First | 1 of 1 | Last

+ -

*Contact Name:

*Relationship to Employee: Other | ☐ Same Address as Employee | ☐ Primary Contact | ☐ Same Phone as Employee

Contact Address

Country: USA | United States

Address: [Edit Address](#)

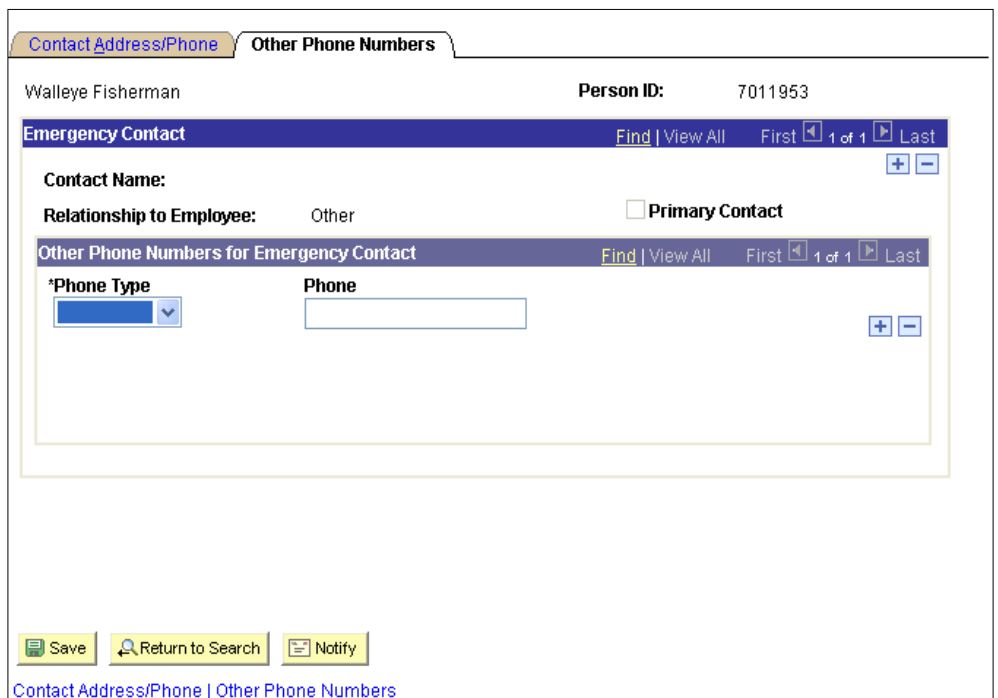
Contact Phone

Phone:

Save | Return to Search | Notify

[Contact Address/Phone](#) | [Other Phone Numbers](#)

Click on **Other Phone Numbers**, if needed.



Contact Address/Phone | **Other Phone Numbers**

Walleye Fisherman | Person ID: 7011953

Emergency Contact | Find | View All | First | 1 of 1 | Last

+ -

Contact Name:

Relationship to Employee: Other | ☐ Primary Contact

Other Phone Numbers for Emergency Contact | Find | View All | First | 1 of 1 | Last

+ -


*Phone Type:

Phone:

Save | Return to Search | Notify

[Contact Address/Phone](#) | [Other Phone Numbers](#)

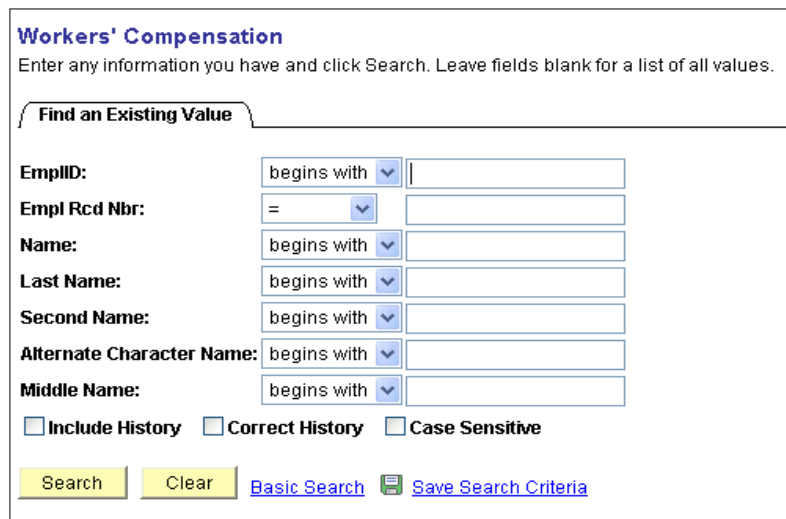
Enter the new contact information as described earlier.

To enter additional phone numbers for any of the emergency contacts, follow the same procedures by clicking the  across from the **Phone Type** and **Phone** fields under the **Other Phone Numbers** Tab.

Click  to save all emergency contact information.

WORKERS' COMPENSATION

To enter an employee's Workers' Compensation information, click on **Main Menu > Workforce Administration > Job Information > Workers' Compensation**. The following screen will appear.




Workers' Compensation
Enter any information you have and click Search. Leave fields blank for a list of all values.

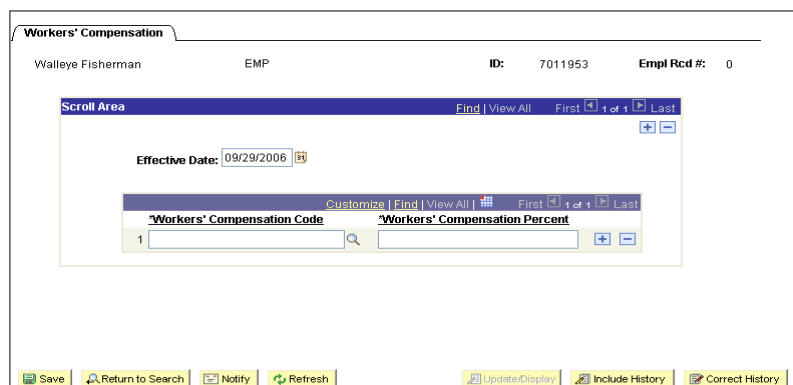
Find an Existing Value

EmplID: begins with
Empl Rcd Nbr: =
Name: begins with
Last Name: begins with
Second Name: begins with
Alternate Character Name: begins with
Middle Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

 [Basic Search](#)  [Save Search Criteria](#)

Input EmplID and click on Search. The following screen will appear:



Workers' Compensation

Walleye Fisherman EMP ID: 7011953 Empl Rcd #: 0

Scroll Area Find | View All First 1 of 1 Last

Effective Date: 09/29/2006

	Workers' Compensation Code	Workers' Compensation Percent
1	<input type="text"/>	<input type="text"/>

Effective Date – The first entry should have the effective date of the hire date, if any changes are made after that, the date should be when the change is effective.

Workers' Compensation Code – Enter the code that identifies the compensation class for the employee. Classes can be found through a lookup.

Workers' Compensation Percent – Enter the percent of the job assigned to each rate class (the percent totals must equal 100%).

Note: An employee can have a maximum of two Worker's Compensation codes with a combined percentage total of 100 percent.

DESIGNATED MEDICAL PROVIDER

To enter an employee's Designated Medical Provider information, click on **Main Menu > Workforce Administration > Personal Information > Personal Relationships > Designated Medical Provider** and the screen below will appear.

Designated Medical Provider

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by: begins with

☐ Include History ☐ Correct History

[Advanced Search](#)

Input the EmplID and click on search and the following screen will appear:

Designated Medical Provider

Walleye Fisherman EMP ID: 7011953 Empl Rcd #: 0

Scroll Area Find | View All First 1 of 1 Last

Effective Date: 09/29/2006

*Designated Medical Provider:

Effective Date – The first entry should have the effective date of the hire date, if any changes are made after that, the date should be when the change is effective.

Designated Medical Provider – Enter the name that identifies the medical provider for the employee. Providers can be found through a lookup.

ADD ADDITIONAL ASSIGNMENT

When you have an employee that will be active in another position within your agency you will need to add additional assignment.

HR: (Navigation: Workforce Administration> Job Information> Add Additional Assignment)

- Enter the employee's EmplID
- Click on the Search Button

Assign Additional Job
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID: begins with

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Click on the Create Assignment Button

Add New Assignment

Person ID:

Organizational Instance Find | View All First 1 of 1 Last

Org Relation: Employee

Organizational Instance: 0

HR Status: Active

Pay Status: Active

Effective Date: 07/01/2005

Business Unit: 11000 Office of Mgmt & Budget

Department: 110110 Office of Management & Budget

Company: ND State of North Dakota

Last Start:

Assignments Customize | Find | First 1-2 of 2 Last

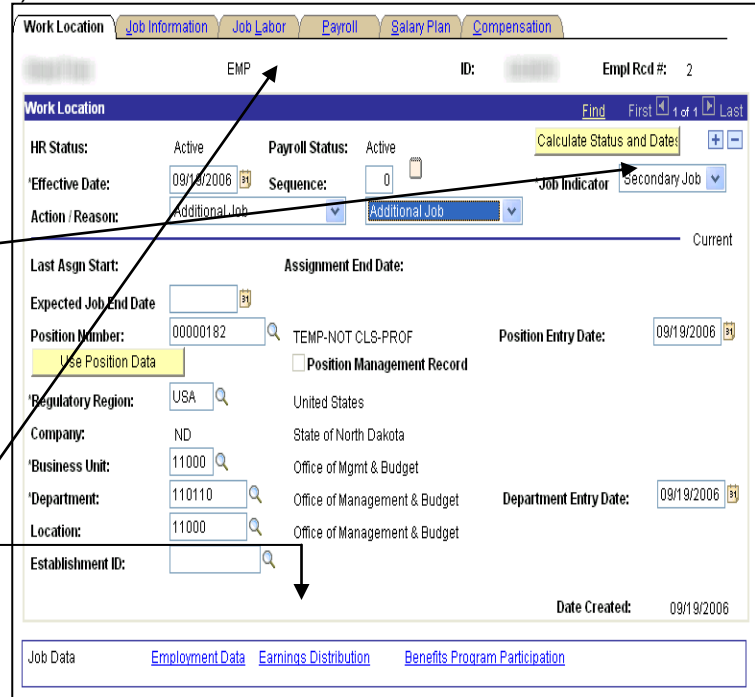
Empl Rcd Nbr	HR Status	Effective Date	Business Unit	Department	Home/Host
0	Active	07/01/2005	11000	110110	Home
1	Active	05/01/2006	11000	110113	Home

Next Empl_Rcd

Add Additional Assignment (work location tab):

- Change the effective date to the hire date
- Effective sequence of 0
- Action of Additional Job
- Reason of Additional Job
- Job Indicator will default to Secondary Job

- Verify the information on
 - Work Location
 - Job Information
 - Payroll
 - Salary Plan
 - Compensation
 - Earnings Distribution



Make any necessary changes.

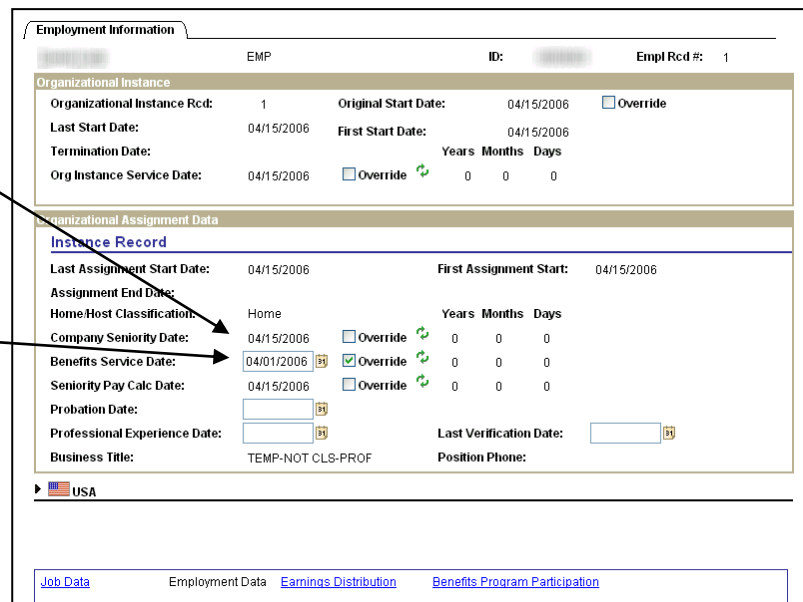
The paygroup for a multiple job employee will always be MJ1.

The Benefit Record Number on the Benefit Program Participation page will default to match the Empl Rcd number, and should be left as that.

After you have saved this data click on the Employment Data Page.

The Company Seniority Date:
This will default to the hire date of this position.

The Benefits Service Date:
This will default to the hire date and you should change it to the first of the month of the hire.
You may do this by clicking the override box, changing the date, and click on save.



The other HR page that should be completed for this employee is the Workers' Compensation page. (Navigation: ND State Applications > Workers' Compensation OR Workforce Administration > Job Information > Workers' Compensation)

The rest of the HR pages (Personal Data, Emergency Contact, Designated Medical Provider and Driver's License Data) and Payroll pages (Direct Deposit, Employee Tax Distribution, Employee Tax Data, and General Deduction Data) should not be changed since this information should follow Empl Rcd 0.

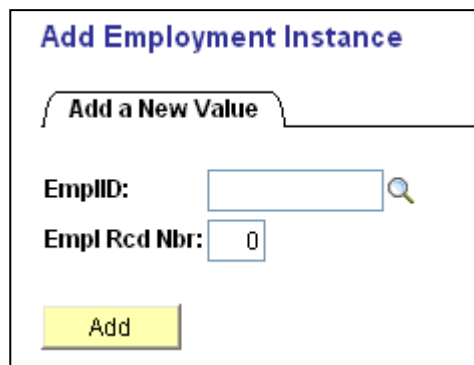
Please move this employee's other empl recd numbers to the MJ1 Paygroup.

ADD EMPLOYMENT INSTANCE

When you have an employee that will be active in another position for another State Agency within the Peoplesoft system you will need to add an employment instance.

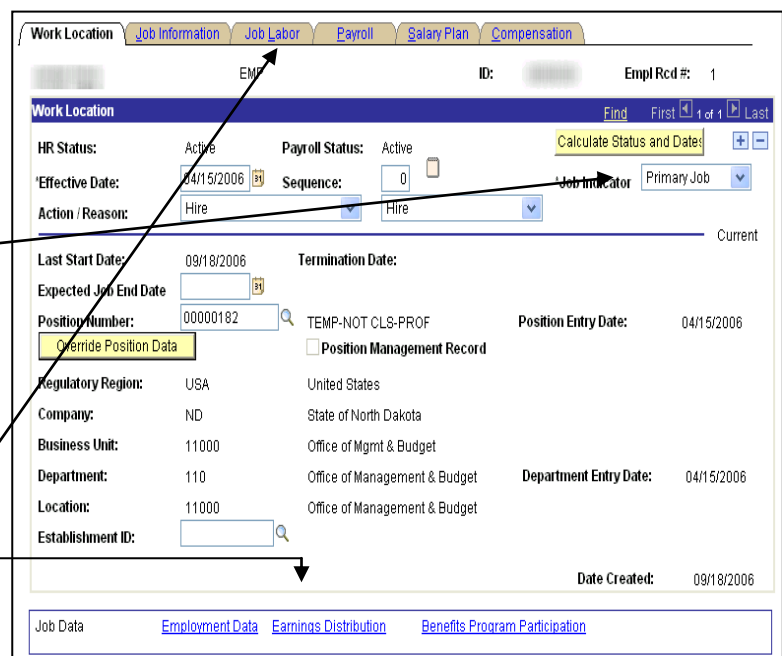
HR: (Navigation: Workforce Administration> Personal Information> New Employment Instance)

- Enter the employee's EmplID
- Empl Rcd Nbr
(The system will assign this when you tab out of the EmplID)
- Click on the Add Button



Add Employment Instance (work location tab):

- Change the effective date to the hire date
- Effective sequence of 0
- Action of Hire
- Reason of HIR
- Job Indicator will default to Primary Job and it should be Secondary Job
- Verify the information on
 - Work Location
 - Job Information
 - Payroll
 - Salary Plan
 - Compensation
 - Earnings Distribution



Make any necessary changes.

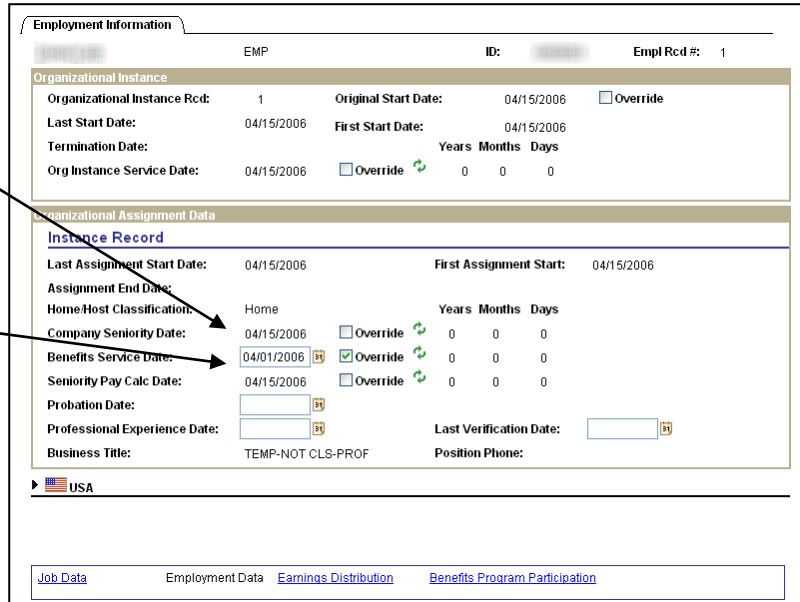
The paygroup for a multiple job employee will always be MJ1.

The Benefit Record Number on the Benefit Program Participation page will default to match the Empl Rcd number. It should be left as that if the employee is employed with a different business unit.

After you have saved this data click on the Employment Data Page.

The Company Seniority Date:
This will default to the hire date
of this position.

The Benefits Service Date:
This will default to the hire date
and you should change it to the first
of the month of the hire.
You may do this by clicking the over
ride box, changing the date, and
clicking on save.



Employment Information

EMP ID: Empl Rcd #: 1

Organizational Instance

Organizational Instance Rcd:	1	Original Start Date:	04/15/2006	<input type="checkbox"/> Override
Last Start Date:	04/15/2006	First Start Date:	04/15/2006	
Termination Date:		Years Months Days		
Org Instance Service Date:	04/15/2006	<input type="checkbox"/> Override	0 0 0	

Organizational Assignment Data

Instance Record

Last Assignment Start Date:	04/15/2006	First Assignment Start:	04/15/2006
Assignment End Date:			
Home/Host Classification:	Home	Years Months Days	
Company Seniority Date:	04/15/2006	<input type="checkbox"/> Override	0 0 0
Benefits Service Date:	04/01/2006	<input checked="" type="checkbox"/> Override	0 0 0
Seniority Pay Calc Date:	04/15/2006	<input type="checkbox"/> Override	0 0 0
Probation Date:			
Professional Experience Date:		Last Verification Date:	
Business Title:	TEMP-NOT CLS-PROF	Position Phone:	

USA

[Job Data](#) [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

The other HR page that should be completed for this employee is the Workers' Compensation page. (Navigation: ND State Applications> Workers' Compensation) and the Designated Medical Provider (Navigation: Workforce Administration> Personal Information> Personal Relationships> Designated Medical Provider).

The rest of the HR pages (Personal Data, Emergency Contact, and Driver's License Data) should not be changed since this information should be maintained by the agency that employs Empl Rcd 0. The Payroll page for Direct Deposit should not be changed either since the agency that employs Empl Rcd 0 also maintains this record. It is very important to inform the employee that his direct deposit information must remain the same for both positions.

The other Payroll pages (Employee Tax Distribution, Employee Tax Data, and General Deduction Data (Navigation: Payroll for North America> Employee Pay Data USA> Tax Information or Deductions)) should not be changed since this information should be maintained by the agency that employs Empl Rcd 0. Benefits and deductions are taken on the primary job of each company for whichever benefits and deductions the employee is eligible for.

MAINTAINING EMPLOYEE INFORMATION

OVERVIEW

When you administer your workforce, you'll spend the bulk of your time keeping a history of your employees' careers with your organization. The information you maintain is, for the most part, the same type of information that you enter to hire or add workers to your workforce.

Before you can view information on a particular person, you must have already created a human resources record for that person, in other words, already added the person into PeopleSoft Human Resources.

OBJECTIVES

At the completion of this section, you will be able to view and update the following employee information:

1. Name
2. Address
3. Emergency Contacts
4. Driver's License
5. Pay Rate
6. General Comments

In addition, you will be able to process the following Job Data employee transactions:

1. Leave of Absence – Unpaid
2. Leave of Absence – Paid
3. FMLA Intermittent Leave
4. Return from Leave
5. Promotion / Demotion with NO Salary Increase
6. Promotion / Demotion with A Salary Increase
7. Hire Temporary as a Full Time Employee
8. Transfers
9. Retirement / Termination
10. Rehire

UPDATING EMPLOYEE INFORMATION

CHANGING PERSONAL DATA

To change an employee's personal information such as employee name and address, use the following navigation path: **Main Menu > Workforce Administration > Personal Information > Modify a Person**. The following page will appear.

Personal Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

EmplID:	begins with	
Name:	begins with	
Last Name:	begins with	
Second Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

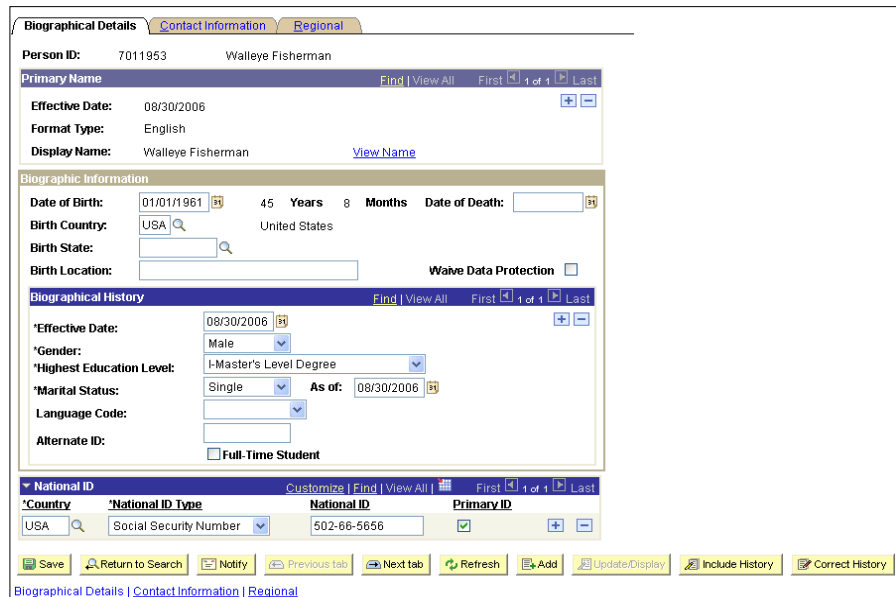
☐ Include History
 ☐ Correct History
 ☐ Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Note: All updates to employee information will begin with this search page. You may search by Employee ID, or Name.

Once you have located the correct employee, the following page will appear.



Biographical Details | [Contact Information](#) | [Regional](#)

Person ID: 7011953 Walleye Fisherman

Primary Name Find | View All First 1 of 1 Last

Effective Date: 08/30/2006 + -

Format Type: English

Display Name: Walleye Fisherman [View Name](#)

Biographic Information

Date of Birth: 01/01/1961 45 Years 8 Months Date of Death: + -

Birth Country: USA United States

Birth State: + -

Birth Location: + - Waive Data Protection ☐

Biographical History Find | View All First 1 of 1 Last

Effective Date: 08/30/2006 + -

Gender: Male

Highest Education Level: I-Master's Level Degree

Marital Status: Single As of: 08/30/2006 + -

Language Code: + -

Alternate ID: + - ☐ Full-Time Student

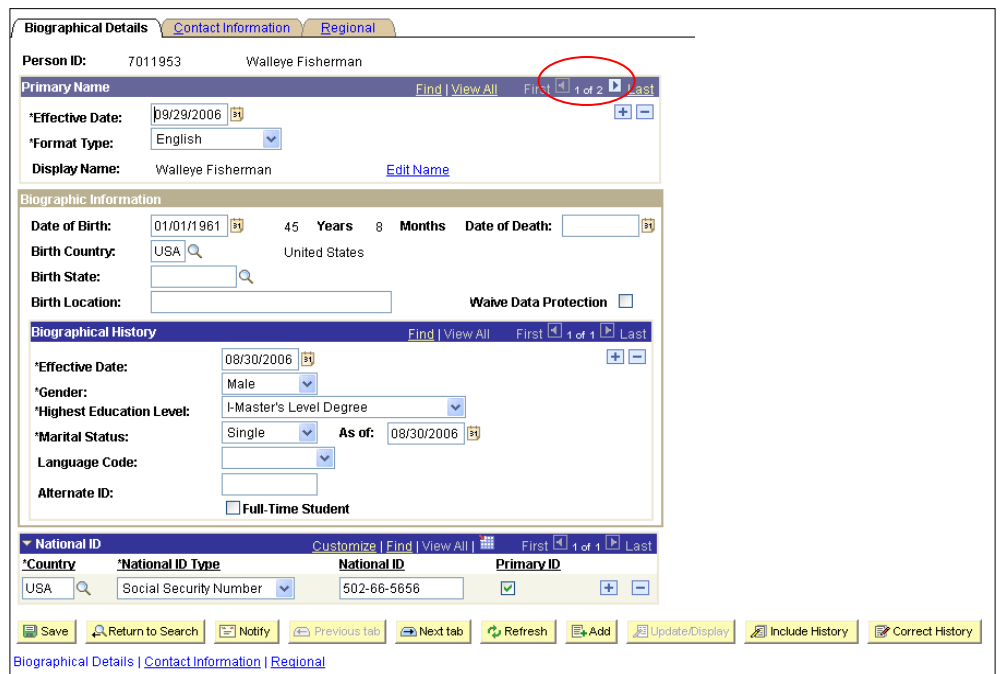
National ID Customize | Find | View All | First 1 of 1 Last

Country	National ID Type	National ID	Primary ID
USA	Social Security Number	502-66-5656	<input checked="" type="checkbox"/>

Save Return to Search Notify Previous tab Next tab Refresh Add Update/Display Include History Correct History

Biographical Details | [Contact Information](#) | [Regional](#)

To make a change to either the employee's name or address click on the **+** across from the **Effective Date** field and the following page will appear.



Biographical Details | [Contact Information](#) | [Regional](#)

Person ID: 7011953 Walleye Fisherman

Primary Name Find | View All First 1 of 2 Last

Effective Date: 09/29/2006 + -

Format Type: English

Display Name: Walleye Fisherman [Edit Name](#)

Biographic Information

Date of Birth: 01/01/1961 45 Years 8 Months Date of Death: + -

Birth Country: USA United States

Birth State: + -

Birth Location: + - Waive Data Protection ☐

Biographical History Find | View All First 1 of 1 Last

Effective Date: 08/30/2006 + -

Gender: Male

Highest Education Level: I-Master's Level Degree

Marital Status: Single As of: 08/30/2006 + -

Language Code: + -

Alternate ID: + - ☐ Full-Time Student

National ID Customize | Find | View All | First 1 of 1 Last

Country	National ID Type	National ID	Primary ID
USA	Social Security Number	502-66-5656	<input checked="" type="checkbox"/>

Save Return to Search Notify Previous tab Next tab Refresh Add Update/Display Include History Correct History

Biographical Details | [Contact Information](#) | [Regional](#)

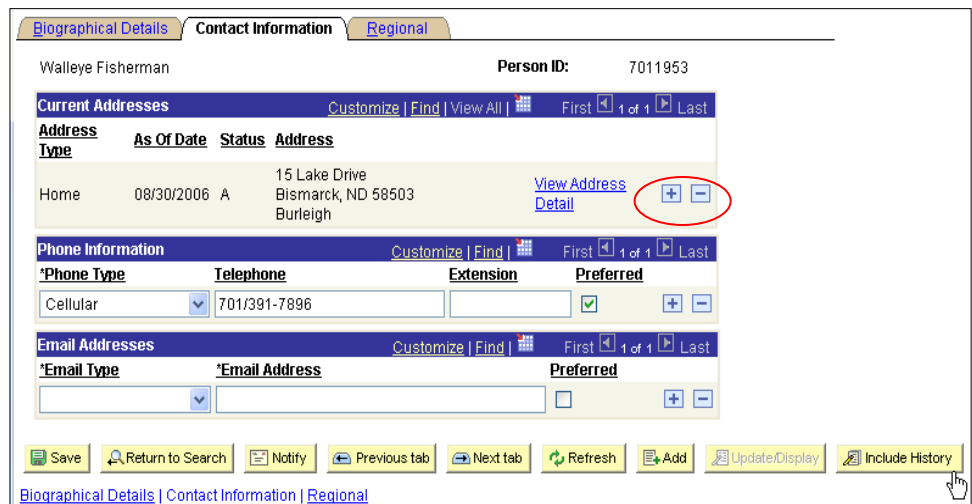
Notice that this **First 1 of 2 Last** is now shown. The first is the record that changes will be entered into, and the second is the latest information that was input for the employee.

The **Effective Date** field defaults to the system date. You can put future dates in as well. The effective date identifies when the changes went into effect (or will go into effect) and preserves the history of the changes by keeping the previous information in a separate record.

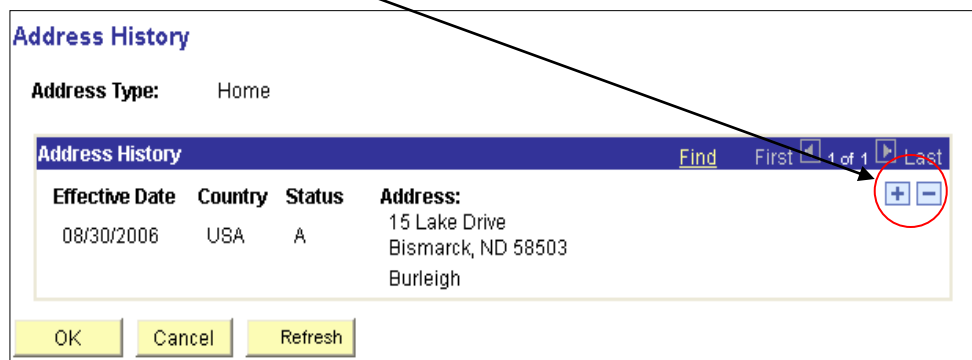
Note: Not all fields for an employee's personal data are effective dated. Changes to **Name**, **Address**, **Marital Status**, and whether an employee is a **Smoker** or **Non-Smoker** are all effective dated. Changes to any other fields in the Personal Data pages are overwritten and no history is kept. This includes phone numbers, educational information, etc.

Enter any name changes on the top record by clicking on Edit Name.

Click on the **Contact Information** tab to make changes to the employee's address, mailing address, or phone number. To change the address you will need to add a row by View Address Detail as shown below:



Then add a row by Add Address Detail and the following screen will appear: Then add another row on this screen.



Click on Add Address:

Address History

Address Type: Home

Effective Date	Country	Status	Address:	
09/29/2006	USA	A	15 Lake Drive Bismarck, ND 58503 Burleigh	Add Address
08/30/2006	USA	A	15 Lake Drive Bismarck, ND 58503 Burleigh	

OK Cancel Refresh

You can now update the address on the screen shown below: When all changes are entered, click on OK and then OK again.

Edit Address

Country: United States

Address 1: 15 Lake Drive


Address 2:

Address 3:

City: Bismarck State: ND North Dakota Postal: 58503

County: Burleigh

OK Cancel

Once all changes are made to an employee's personal data, click  Save to save the changes.

EMERGENCY CONTACT

To enter or change an employee's emergency contact information, use the following navigation path: **Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact**. The search page will appear as described above. Once you have selected the appropriate employee, the following page will appear.

Contact Address/Phone

Other Phone Numbers

Walleye Fisherman

Person ID: 7011953

Emergency Contact

Find | View All First 1 of 1 Last

*Contact Name: Sammy Walleye

*Relationship to Employee: Other

☒ Primary Contact

☒ Same Address as Employee

☒ Same Phone as Employee

Address Type: Home

Phone Type: Cellular

Employee's Current Address

Country: USA United States

Address: 6000 Pioneer Drive
Bismarck, ND 58503
Burleigh

Employee's Phone

Phone: 701/391-7896


Save

Return to Search


Notify

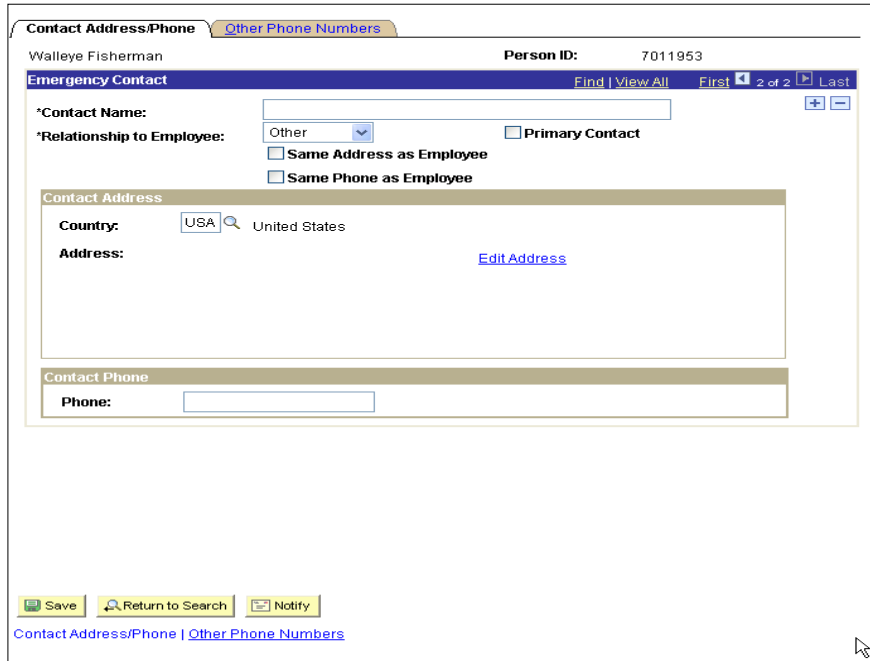
[Contact Address/Phone](#) | [Other Phone Numbers](#)

CHANGING CURRENT INFORMATION

To change the current Emergency Contact information, type the new information into the appropriate fields. Since Emergency Contact information is not effective dated, type over the existing information. Click on the **Other Phone Numbers** tab to change other phone numbers if necessary. When you are finished, click .

ENTERING ADDITIONAL EMERGENCY CONTACTS

To enter additional emergency contacts, click on the  across from the **Contact Name** field. A new emergency contact record will appear below the original as shown in the following screen shot.

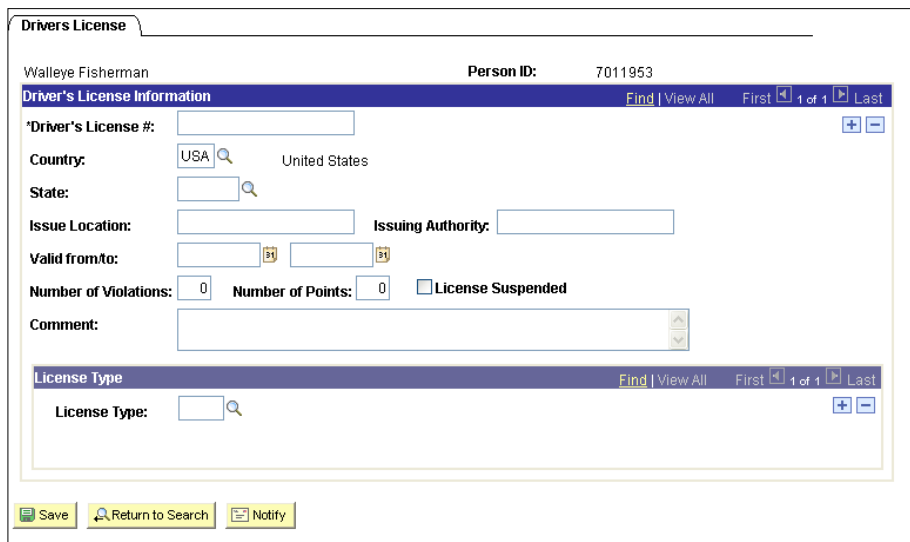


Contact Address/Phone | [Other Phone Numbers](#)
 Walleye Fisherman | Person ID: 7011953
 Emergency Contact | [Find](#) | [View All](#) | First | 2 of 2 | Last
 *Contact Name:
 *Relationship to Employee: | ☐ Primary Contact
☐ Same Address as Employee
☐ Same Phone as Employee
 Contact Address
 Country: United States
 Address: [Edit Address](#)
 Contact Phone
 Phone:
[Save](#) | [Return to Search](#) | [Notify](#)
[Contact Address/Phone](#) | [Other Phone Numbers](#)

Enter the new contact information and click .

DRIVER'S LICENSE

To enter or change an employee's Driver's License information, use the following navigation path: **Main Menu > Workforce Administration > Personal Information > Biographical > Driver's License Data**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.



Drivers License

Walleye Fisherman Person ID: 7011953

Driver's License Information Find | View All First 1 of 1 Last

*Driver's License #:

Country: United States

State:

Issue Location: Issuing Authority:

Valid from/to:

Number of Violations: Number of Points: ☐ License Suspended


Comment:

License Type Find | View All First 1 of 1 Last


License Type:

Save Return to Search Notify


CHANGING CURRENT INFORMATION

To change the current Driver's License information, type the new information into the appropriate fields. As with Emergency Contact information, Driver's License information is not effective dated. To change the information, type over the previous entries. When you are finished, click .

ENTERING ADDITIONAL DRIVER'S LICENSE INFORMATION

To enter additional Driver's License information, click on the  across from the **Driver's License #** field. A new Driver's License record will appear below the original.

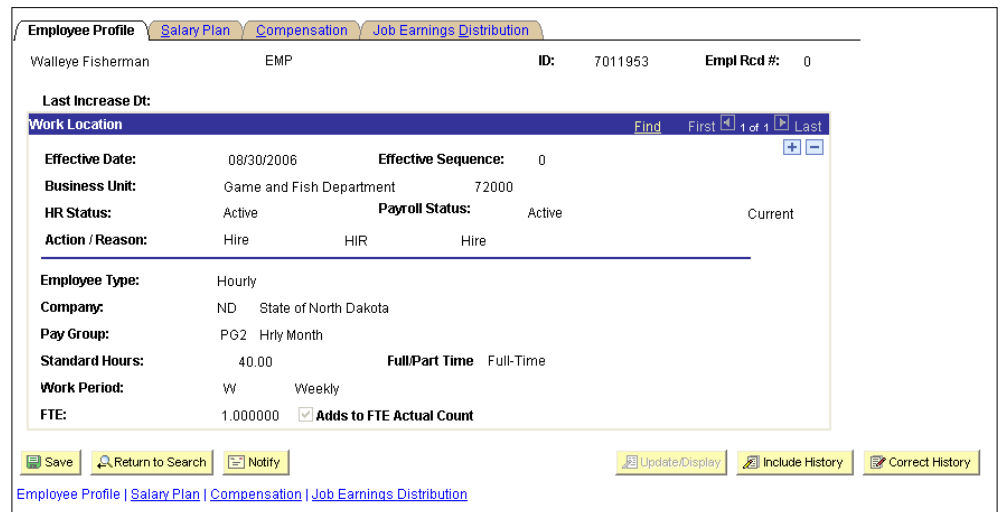
Enter the new information and click .

To enter additional Driver's License types, follow the same procedures by clicking the  across from the **License Type** field in the License Type section.

PAY RATE CHANGES

Use the Pay Rate Change pages to enter a salary change for an employee that isn't related to a change on the position. For example: if the salary grade or job code fields change, this update is completed on the position. The Pay Rate Change pages should only be used to update the compensation (i.e. service adjustments and step).

To process pay rate changes, use the following navigation path **Main Menu > Workforce Administration > Job Information > Pay Rate Change**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.




EMPLOYEE PROFILE PAGE

To begin the Pay Rate change process, click on the **+** located across from the **Effective Sequence** field in the **Employee Profile** Tab. A new record will be created as shown by the **First 1 of 2 Last**



The **Effective Date** field defaults in the current date. You can put future dates in as well. The effective date identifies when the changes went into effect (or will go into effect) and preserves the history of the changes by keeping the previous information in a separate record.

The **Action / Reason** field defaults to *Pay Rate Change* for the Action. Select a reason code by clicking on the  (i.e. equity increase, merit, etc.).

SALARY PLAN PAGE

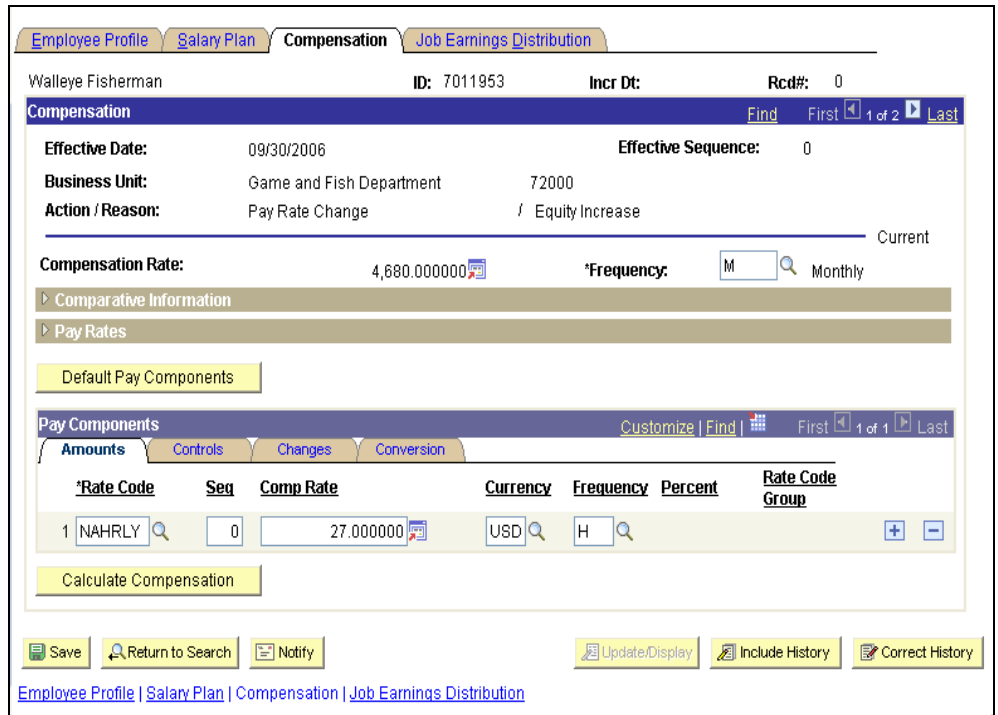
Click on the **Salary Plan** tab and the following page will appear.

Employee Profile				Salary Plan		Compensation		Job Earnings Distribution	
Walleye Fisherman				ID:	7011953	Incr Dt:		Rcd#:	0
Salary Plan								Find First 1 of 2 Last	
Effective Date:		09/30/2006		Effective Sequence:		0			
Business Unit:		Game and Fish Department		72000					
Action / Reason:		Pay Rate Change		/ Equity Increase				Current	
Salary Administration Plan:		CLSD		Grade:		013		Grade Entry Date: 08/30/2006	
				Step:		<input type="text"/>		Step Entry Date: <input type="text"/>	
<div> <input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/> </div>									
Employee Profile Salary Plan Compensation Job Earnings Distribution									

This page is currently not applicable.

COMPENSATION PAGE

Click on the **Compensation** tab and the following page will appear.



Employee Profile | Salary Plan | **Compensation** | Job Earnings Distribution

Walleye Fisherman ID: 7011953 Incr Dt: Rcd#: 0

Compensation Find First 1 of 2 Last

Effective Date: 09/30/2006 Effective Sequence: 0

Business Unit: Game and Fish Department 72000

Action / Reason: Pay Rate Change / Equity Increase

Compensation Rate: 4,680.000000 *Frequency: M Monthly

Comparative Information

Pay Rates

Default Pay Components

Pay Components Customize Find First 1 of 1 Last

Amounts Controls Changes Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 NAHRLY	0	27.000000	USD	H		

Calculate Compensation

Save Return to Search Notify Update/Display Include History Correct History

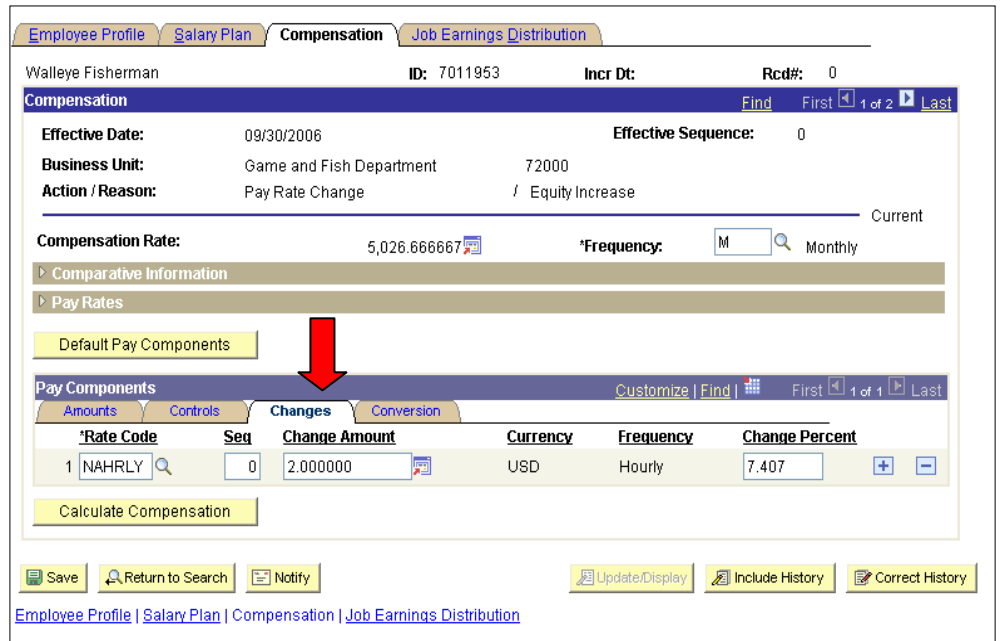
[Employee Profile](#) | [Salary Plan](#) | [Compensation](#) | [Job Earnings Distribution](#)

To enter a new pay rate, you can enter the rate code and the new compensation rate.

Click on the calculate compensation button.

Based on the compensation rate and frequency, the system calculates and displays the hourly, daily, monthly, and annual rate for the employee.

The compensation rate is entered in the **Comp Rate** field. To enter either a specific compensation change amount (e.g. a \$2000 increase) or a percentage change, click the **Changes** tab (as depicted by the arrow below) and enter the information in the appropriate fields.



Employee Profile | Salary Plan | **Compensation** | Job Earnings Distribution

Walleye Fisherman ID: 7011953 Incr Dt: Rcd#: 0

Compensation Find First 1 of 2 Last

Effective Date: 09/30/2006 Effective Sequence: 0

Business Unit: Game and Fish Department 72000

Action / Reason: Pay Rate Change / Equity Increase

Compensation Rate: 5,026.666667 *Frequency: M Monthly

Comparative Information

Pay Rates

Default Pay Components

Pay Components Customize | Find | First 1 of 1 Last

Amounts Controls **Changes** Conversion

Rate Code	Seq	Change Amount	Currency	Frequency	Change Percent
1 NAHRLY	0	2.000000	USD	Hourly	7.407

Calculate Compensation

Save Return to Search Notify Update/Display Include History Correct History

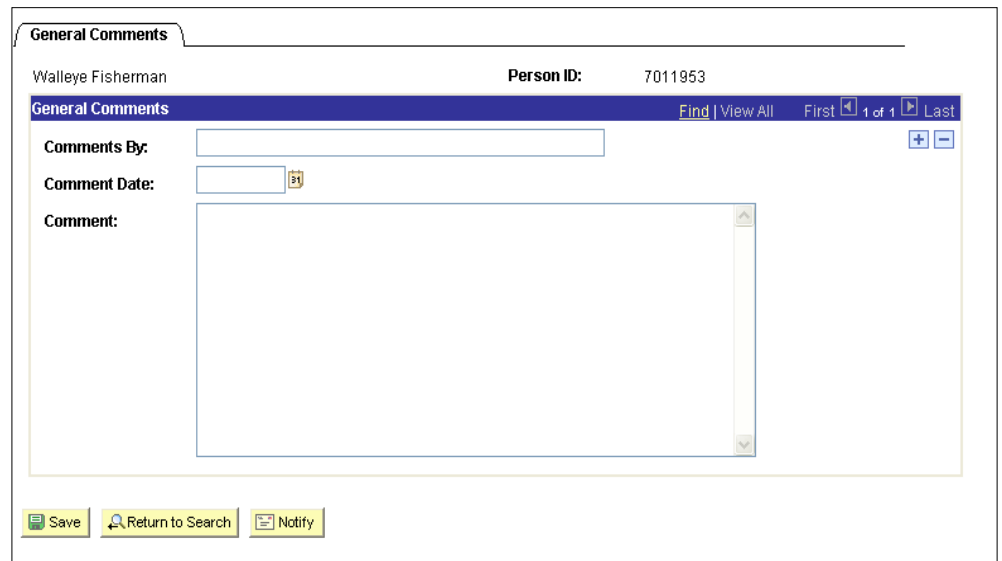
Employee Profile | Salary Plan | Compensation | Job Earnings Distribution

Click  **Save** to save all Pay Rate Change information.

ADDING GENERAL COMMENTS

Use the **General Comments** page to enter miscellaneous comments about employees that are not incorporated in any other section of PeopleSoft Human Resources system.

Use the following navigation path to open the General Comments page:
Main Menu > Workforce Administration > Personal Information > Biographical > General Comments. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.



The screenshot shows the 'General Comments' page for employee Walleye Fisherman (Person ID: 7011953). The page has a header with the employee's name and ID. Below the header is a search bar with 'Find | View All' and navigation buttons 'First', '1 of 1', and 'Last'. The main area contains a table with one row. The table has columns for 'Comments By', 'Comment Date', and 'Comment'. The 'Comments By' column has a text input field. The 'Comment Date' column has a date input field with a calendar icon. The 'Comment' column has a large text area. At the bottom of the page are three buttons: 'Save', 'Return to Search', and 'Notify'.

The page pictured above depicts an employee who does not have any general comments entered for them. Therefore, you can begin entering data in the **Comments By**, **Comment Date**, and **Comment** fields. The **Comment** text field will hold up to 250 characters.

If you need to add a new row for comments (e.g. the Comment page is already filled out), click the **+** across from the **Comments By** field. This will create a new row below the existing comment.

Fill in the **Comments By**, **Comment Date**, and **Comment** fields and click on **Save**.

Note: Enter information that has been approved and is intended to become a part of the employee's permanent record.

JOB DATA ACTIONS

OVERVIEW

You will usually update job data by inserting new effective-dated rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them years ago or want changes to go into effect months or years into the future. This enables you to analyze position data or employee records for particular periods of time.

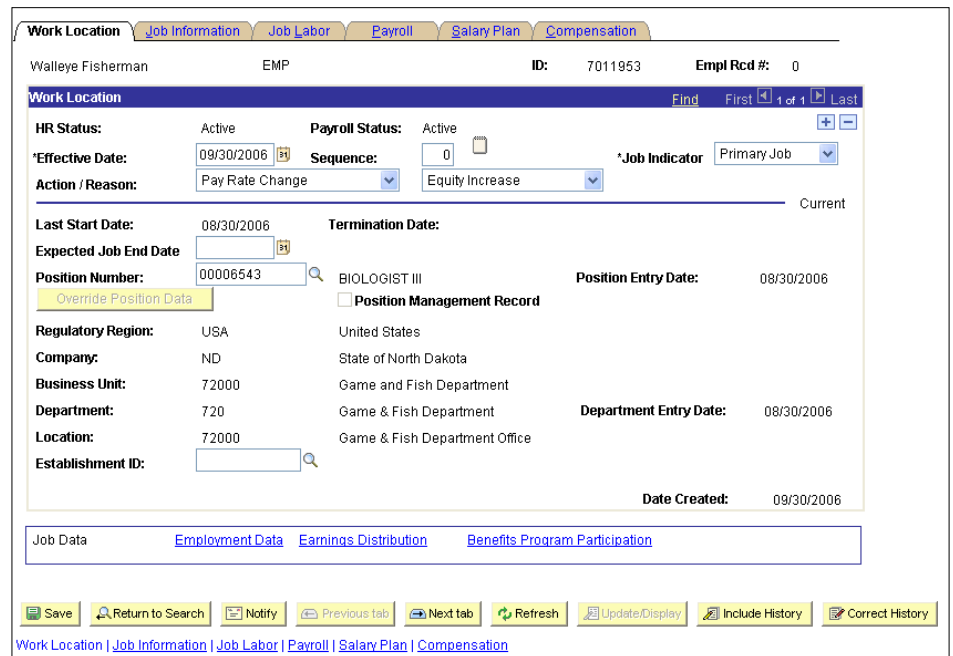
The system also uses effective dates to compare pages and tables to make sure that the prompt tables you see list only data that is valid as of the effective date of the page where you're working. For example, assume you create a new department code with an effective date of October 1, 2006. If you enter a new data row (or update an existing row) on the Job Data pages that have an effective date *before* October 1, 2006, you will not see the new code as a valid choice when you select a department because the new code has not yet taken effect.

When you enter a new data row, the system copies the contents of the previous row into the new row. This saves you the time of retyping information that stays the same. (Make sure you have the cursor on the data row you want to copy before you insert the new row.) The only new information you will see is the effective date, which defaults to the system date, which you can change if necessary.

YOU MUST ENTER AN ACTION and REASON FOR EACH ACTION ENTERED WITH THE APPROPRIATE SEQUENCE NUMBER. YOU CAN HAVE MORE THAN ONE ACTION PER EFFECTIVE DATE. FOR EXAMPLE: AN EMPLOYEE MAY BE RECLASSIFIED AND RECEIVE A PAY RATE CHANGE ON THE SAME EFFECTIVE DATE.

ACCESSING / CHANGING JOB DATA

To begin using the Job Data pages, use the following navigation path: **Main Menu > Workforce Administration > Job Information > Job Data**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.



Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Walleye Fisherman EMP ID: 7011953 Empl Rcd #: 0

Work Location Find First 1 of 1 Last

HR Status: Active Payroll Status: Active

*Effective Date: 09/30/2006 Sequence: 0 *Job Indicator: Primary Job

Action / Reason: Pay Rate Change Equity Increase

Last Start Date: 08/30/2006 Termination Date:

Expected Job End Date: Position Number: 00006543

Override Position Data

Regulatory Region: USA United States

Company: ND State of North Dakota

Business Unit: 72000 Game and Fish Department

Department: 720 Game & Fish Department

Location: 72000 Game & Fish Department Office

Establishment ID:

Position Entry Date: 08/30/2006


Department Entry Date: 08/30/2006

Date Created: 09/30/2006

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Previous tab Next tab Refresh Update/Display Include History Correct History


Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Insert a new data row by clicking the  sign across from the Payroll Status field. A new data row will appear above the original.

As stated earlier, the **Effective Date** field defaults to the current date.

The following Job Data scenarios begin with the assumption you have already selected the employee and inserted a new row.


ACTION 1: LEAVE OF ABSENCE (UNPAID LEAVE)

1. Enter the following in the **Action / Reason** fields: *Leave of Absence / Choose a reason*.
2. Click on .


The system will calculate the appropriate amount of pay.

Note: Leave of Absence (unpaid) is valid in the **Action / Reason** field only if the employee status is *Active*, *On Paid Leave*, *on Work Break*, or *Suspension*.


When the employee returns from leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *RFL*.
4. Verify that the employee status is *Active*.
5. Investigate for job data changes due upon Return from Leave (i.e. service adjustment, etc.)
6. Click on .


ACTION 2: PAID LEAVE OF ABSENCE

1. Enter the following in the **Action / Reason** fields: *Paid Leave of Absence (ADM, DEV, or MIL)*
2. Click on .


To change the action to a leave of absence (unpaid) and extend the leave:

1. Insert another row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Leave of Absence*
4. Click on .

To extend the leave for another reason:

1. Insert another row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Data Change*.
4. Click on .


When the employee Returns from Leave:

1. Insert a row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Return from Leave / RFL*.
4. Click on .
5. Verify that the employee status is *Active*.
6. Investigate for job data changes due upon Return from Leave (i.e. service adjustment, etc.)

ACTION 3: FMLA INTERMITTENT LEAVE


1. Enter the following in the **Action / Reason** fields: *Leave of Absence / FML*
2. Click on .

When the employee Returns from FMLA Intermittent Leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Data Change / RFL*.
4. Click on .
5. Verify the employee status is *Active*.

ACTION 4: RETURN FROM LEAVE

When the employee returns from leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Return from Leave / RFL*.
4. Click on .
5. Verify that the employee status is *Active*.
6. Investigate for job data changes due upon *Return from Leave* (i.e. service adjustment, step increase, contract increase, etc.)



ACTION 5: PROMOTION / DEMOTION WITH NO CHANGE IN SALARY

1. Insert new effective dated row.

Note: In addition to the assumptions stated earlier, this scenario assumes that all Position information for the position that the employee is promoted / demoted into has been verified / setup through Position Management. See the Managing Positions section of this manual for more information.

2. Verify that the **Job Indicator** field displays *Primary Job*.
3. Enter the following in the **Action / Reason** fields: *Promotion / <choose a reason>* for promotions and *Demotion / <choose a reason>* for demotions.

Note: The remaining steps are similar to the original hiring process as described in the Hiring portion of the manual.

4. Enter the position number in the **Position Number** field.
5. Verify that the following fields default to the correct information:
Position Entry Date, Department Entry Date, Company, Department, and Location.
6. Click on the **Job Information** tab.
7. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary, Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on  **USA**).
8. Click on the **Payroll** tab.
9. Enter the appropriate pay group in the **Pay Group** field.
10. Click on the **Salary Plan** tab.
11. Verify that the following fields default the correct information: **Salary Plan** and **Grade**.
12. Click on the **Compensation** tab and verify that salary does not change.
13. Click on the [Benefits Program Participation](#) hyperlink.
14. Verify information.
15. Click on .



ACTION 6: PROMOTION / DEMOTION WITH A CHANGE IN SALARY

1. Insert new effective dated row.



Note: In addition to the assumptions stated earlier, this scenario assumes that all Position information for the position that the employee is promoted / demoted into has been verified / setup through Position Management. See the Managing Positions section of this manual for more information.

2. Verify that the **Job Indicator** field displays *Primary Job*.
3. Enter the following in the **Action / Reason** fields: Pay Rate Change <choose a reason> promotion or reduction in pay for demotions.

Note: The remaining steps are similar to the original hiring process as described in the Hiring portion of the manual.


4. Enter the position number in the **Position Number** field.
5. Verify that the following fields default to the correct information: **Position Entry Date, Department Entry Date, Company, Department, and Location.**
6. Click on the **Job Information** tab.
7. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary, Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on  **USA**).
8. Click on the **Payroll** tab.
9. Enter the appropriate pay group in the **Pay Group** field.
10. Click on the **Salary Plan** tab.
11. Verify that the following fields default the correct information: **Salary Plan** and **Grade.**
12. Click on the **Compensation** tab.
13. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field, click on **Calculate Compensation.**
14. Click on the Benefits Program Participation hyperlink.
15. Verify information.
16. Click on .

ACTION 7: HIRE TEMPORARY AS A FULL TIME EMPLOYEE (NO BREAK IN SERVICE)


1. Enter the following in the **Action / Reason** fields: *Data Change*
Choose a reason (ex. *Status Change*).
2. Enter the position number in the **Position Number** field.
3. Verify that the following fields default the correct information:
Position Entry Date, Department Entry Date, Company, Department, and Location.
4. Click on the **Job Information** tab.
5. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary, Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on  **USA**).
6. Click on the **Payroll** tab.
7. Enter the appropriate pay group in the **Pay Group** field.
8. Click on the **Salary Plan** tab.
9. Verify that the following fields default the correct information: **Salary Plan** and **Grade**.
10. Click on the **Compensation** tab.
11. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field. Click on **Calculate Compensation**.
12. Click on the Employment Data hyperlink.
13. Click on the **Employment Dates** tab.
14. Enter / verify **Company Seniority Date** and **Benefits Service Date**.
15. Enter probation / provisional date (if applicable) in the **Probation Date** field.
16. Verify the information on the **Benefit Program Participation** hyperlink.
17. Click on .

ACTION 8: TRANSFERS



Note: This scenario assumes that you have already updated the position and have **not** chosen to Update Incumbents.

1. Enter the following in the **Action / Reason** fields: *Transfer / <choose a reason>*.
2. Enter the new position number in the **Position Number** field.
3. Click on the **Job Information** tab and verify information is correct.
4. Click on the **Payroll** tab.
5. Enter the appropriate information in the **Pay Group** field and verify the **Holiday Schedule** is correct.
6. Click on the **Salary Plan** tab and verify information is correct.
7. Click on the Employment Data hyperlink.
8. Click on the **Employment Dates** tab.
9. Enter probationary / provisional dates in the **Probation Date** field if applicable.
10. Click on  to complete the transfer process.

ACTION 9: RETIREMENT / TERMINATION

1. Insert new effective dated row.
2. Enter the following in the **Action / Reason** fields: *Retirement (or Termination) / <choose a reason>*
3. Click on .
4. Verify that the employee status is *Retired / Terminated*.
5. Run the Benefit process.

ACTION 10: REHIRE

1. Insert new effective dated row.
2. Enter the following in the **Action / Reason** fields: *Rehire / Rehire*
3. Enter the position number in the **Position Number** field.
4. Verify that the following fields defaulted the correct information:
Position Entry Date, Department Entry Date, Company, Department, and Location.
5. Click on the **Job Information** tab.
6. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary, Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on  **USA**).
7. Click on the **Payroll** tab.
8. Enter the appropriate pay group in the **Pay Group** field.
9. Click on the **Salary Plan** tab.
10. Verify that the following fields default the correct information: **Salary Plan and Grade.**
11. Click on the **Compensation** tab.
12. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field. Click on **Calculate Compensation.**
13. Click on the Employment Data hyperlink.
14. Enter (as appropriate) the probationary / provisional date in the **Probation Date** field.
15. Enter or verify **Company Seniority Date** and **Benefits Service Date** based on the type of rehire (reinstatement or reemployment).
16. Verify the information on the **Benefit Program Participation** hyperlink.
17. Click on .



VIEWING SUMMARY INFORMATION

OVERVIEW

At times, you will want to take a quick look at information summarizing the history of an employee with your organization. PeopleSoft Human Resources features a variety of pages that summarize employee data you have entered in other pages throughout the system.

Note: All of the PeopleSoft pages that are accessed in this section of the training manual are display only pages. No data can be entered or modified.

OBJECTIVES

At the completion of this section, you will be able to:

1. View employee job and compensation history.
2. Locate employees by Social Security Number.

JOB SUMMARY

Use the Job Summary page to obtain an overview of an employee's job history with your organization. You will see all the administrative actions implemented for this employee. Such actions might include pay rate changes, disciplinary actions, leave of absences, promotions, or transfers. In essence, the information on this page is a summary of any changes entered in the Job Data pages.

Click on **Main Menu > Workforce Administration > Job Information > Review Job Information > Job Summary** navigation path and the following page will appear.

Job Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID:

begins with

7011953

Empl Rcd Nbr:

=

0

Name:

begins with

Last Name:

begins with

Second Name:

begins with

Alternate Character Name:

begins with

Middle Name:

begins with

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All First 1 of 1 Last

EmplID	Empl Rcd Nbr	Name	Last Name	Second Name	Alternate Character Name	Middle Name
7011953 0		Walleve Fisherman	FISHERMAN	(blank)	(blank)	B

Enter the **Employee ID or LastName** in the search criteria box.
Click on the **Search** button.

The **Job Summary** page will appear.

Job Summary

Walleye Fisherman

EMP

ID: 7011953

Empl Rcd #: 0

Job Information

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-3 of 3](#) | [Last](#)

General

Job Information

Work Location

Compensation

Eff Date	Sequence	Short Description	Action Reason
10/01/2006	0	LOA	Personal Reasons
09/30/2006	0	Pay Rt Chg	Equity Increase
08/30/2006	0	Hire	Hire

[Return to Search](#)
[Notify](#)

There are four different pages within Job Summary. They are the **General**, **Job Information**, **Work Location**, and **Compensation** pages.

The following fields are displayed on the **General** page.

Effective Date – Indicates when the action took effect.

Sequence – Tracks actions that occur in the same day.

Short Description – Describes what action took place.

Action Reason – Provides rationale for the action.

Click on the **Job Information** tab to display the following page.

Job Summary

Walleye Fisherman

EMP

ID: 7011953

Empl Rcd #: 0

Job Information

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-3 of 3](#) | [Last](#)

General

Job Information

Work Location

Compensation

Eff Date	Sequence	Job Code	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
10/01/2006	0	CL6073	Hourly	Leave	Full-Time	Regular	40.00	Weekly
09/30/2006	0	CL6073	Hourly	Active	Full-Time	Regular	40.00	Weekly
08/30/2006	0	CL6073	Hourly	Active	Full-Time	Regular	40.00	Weekly



The following fields are displayed on the **Job Information** page:

Effective Date – Indicates when the action took effect.

Sequence – Tracks actions that occur in the same day.

Jobcode – Describes the job the employee held after each personnel action.

Empl Type – Describes whether the employee was hourly, salary, etc. after each personnel action.

Empl Status – Indicates whether the employee was *Active, Terminated, Retired, etc.*, after each personnel action.

Full / Part Time – Indicates whether the employee was a *Full* or *Part Time* employee after each personnel action.

Reg / Temp - Indicates whether the employee was a *Regular* or *Temporary* employee after each personnel action.

Standard Hours – Indicates the standard number of hours per week the employee worked after each personnel action.

Work Period – Identifies the time period for the Standard Hours after each personnel action.



Click on the **Work Location** tab to display the following page.

Job Summary

Walleye FishermanEMPID: 7011953Empl Rcd #: 0

Job Information

Customize | Find | View All | First 1-3 of 3 Last

General

Job Information

Work Location

Compensation

Eff Date	Sequence	Position	Company	DeptID	Sal Plan	Grade	Pay Group	Frequency
10/01/2006	0	BIOLOGIST	ND	G & F	CLSD	013	PG2	Monthly
09/30/2006	0	BIOLOGIST	ND	G & F	CLSD	013	PG2	Monthly
08/30/2006	0	BIOLOGIST	ND	G & F	CLSD	013	PG2	Monthly

The following fields are displayed on the **Work Location** page:

Effective Date – Same as previous page.

Sequence – Same as previous page.

Position – Identifies the Position the employee held after each personnel action.

Company - Identifies the organization the employee belonged to after each personnel action was taken. This will display *ND* for State of North Dakota active employees.

DeptID - Identifies the department the employee belonged to after each personnel action was taken.

Sal Plan and **Grade** – Indicates the salary plan and salary grade the employee was in after each personnel action was taken.

Pay Group – Identifies the pay group the employee belonged to after each personnel action was taken.

Frequency – Indicates the pay frequency (e.g. Monthly) for the employee after each personnel action.



Click on the **Compensation** tab to display the following page.

Job Summary								
Walleye Fisherman			EMP	ID:	7011953	Empl Rcd #:	0	
Job Information Customize Find View All First 1-3 of 3 Last								
General Job Information Work Location Compensation								
Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
10/01/2006	0	\$60,320.000	\$5,026.667	\$232.000	\$29.000000	USD	0.000	Components
09/30/2006	0	\$60,320.000	\$5,026.667	\$232.000	\$29.000000	USD	7.407	Components
08/30/2006	0	\$56,160.000	\$4,680.000	\$216.000	\$27.000000	USD	0.000	Components

The following fields are displayed on the **Compensation** page.

Effective Date – Same as previous page.

Sequence – Same as previous page.

Annual Rt, Monthly Rt, Daily Rt, & Hrly Rt – Indicates the compensation rates for the employee after each personnel action.

Currency – This will always be US dollars (*USD*).

Change Percent – The percent change in compensation after each personnel action.

Components – Each personnel action has a hyperlink to a compensation components page. The compensation page shows the detail pay components such as rate code (e.g. *NAANNL*, *NAHRLY*, or *MTHLY*), compensation rate, and change amounts. Examples of components pages are listed below.

EXAMPLE COMPONENTS PAGE – AMOUNTS TAB

Salary Components

Walleye Fisherman ID: 7011953 Empl Rcd#: 0

Compensation Rate: 5,026.666667 USD

Compensation Frequency: M Monthly

Pay Components

Amounts Controls Changes Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 NAHRLY	0	29.000000	USD	Hourly			

OK Cancel

EXAMPLE COMPONENTS PAGE – CONTROLS PAGE

Salary Components

Walleye Fisherman ID: 7011953 Empl Rcd#: 0

Compensation Rate: 5,026.666667 USD

Compensation Frequency: M Monthly

Pay Components

Amounts Controls Changes Conversion

Rate Code	Seq	Source	Calculated By	Manually Updated	Default Without Override	Details
1 NAHRLY	0	Manual	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Details

OK Cancel

EXAMPLE COMPONENTS PAGE – CHANGES TAB

Salary Components

Walleye Fisherman ID: 7011953 Empl Rcd#: 0

Compensation Rate: 5,026.666667 USD

Compensation Frequency: M Monthly

Pay Components

Amounts Controls Changes Conversion

Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent
1 NAHRLY	0		USD	Hourly		

OK Cancel

EXAMPLE COMPONENTS PAGE – CONVERSION TAB

Salary Components

Walleye Fisherman ID: 7011953 Empl Rcd#: 0

Compensation Rate: 5,026.666667 USD

Compensation Frequency: M Monthly

Pay Components

Amounts Controls Changes **Conversion**

Rate Code	Seq	Converted Comp Rate	Apply FTE
1 NAHRLY	0	5,026.666667 USD Monthly	<input type="checkbox"/>

OK Cancel

SEARCH BY NATIONAL ID

Use the Search by National Id pages to locate a person's employee ID number using their Social Security Number. Once you find the person's employee ID, you can use it when you move to other Search pages.

Click on the following navigational path **Main Menu > Workforce Administration > Personal Information > Biographical > Search by National ID** and the following page will appear.

Search by National ID

National ID:

*Search in: Employees / Contingents / POI

Lookup by NID [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

National ID	EmplID	Name	Country	National ID Type

Enter the employees Social Security Number in the **National ID** field (no punctuation is required) and click .

PeopleSoft then displays the employee's name, employee ID, Country, and National ID Type (e.g. Social Security Number).

You can now use the employee ID for other Search pages.



HUMAN RESOURCES REPORTING

OVERVIEW

This section describes how to run and view Human Resources reports through the process monitor and report manager.

OBJECTIVES

After completing this section, you will be able to:

1. Run Reports.
2. Review Reports through the Process Monitor.
3. Review Reports through the Report Manager.

RUNNING STANDARD REPORTS

In this section, the general procedure for running the standard reports that come with your PeopleSoft applications is covered. If you (or someone in your organization) have added custom reports to the system, the procedure should be similar to the one described.

The following sections briefly introduce you to the fundamentals of submitting, monitoring, and viewing reports. The following topics will be covered:

- Requesting Reports in PeopleSoft Applications
- Running Reports using the Process Scheduler
- Checking the Status of a Report
- Viewing Report Results

Note: The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your application tells you which application to use.

REQUESTING REPORTS IN PEOPLESOFT APPLICATIONS

To begin the reporting process, use the following navigational path: **Main Menu > Workforce Administration > Job Information > Reports > Personnel Actions History**. Most of the reports that will be run by agencies are at the following navigation: **Main Menu > ND State Applications > Reports**.

The Report Menu List will display several delivered reports that are available through PeopleSoft. For our example we are going to use the Personnel Actions History report.

When you select a report from a menu, you will be prompted for a **Run Control ID**. Each run control you create receives a unique Run Control ID. You may use any value for a Run Control ID. If there is not a predefined Run Control ID, you can create one by clicking on the Add a New Value hyperlink.

Personnel Actions History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

Run Control ID: begins with

☐ Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

Find an Existing Value | Add a New Value

Click on the [Add a New Value](#) hyperlink and enter a value for your **Run Control ID**. This value can be used as often as you like. Click the [Add](#) button.

Personnel Actions History

[Find an Existing Value](#)
[Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

You are now ready to run your report through the Process Scheduler.

RUNNING REPORTS USING THE PROCESS SCHEDULER

The following page will appear after you have added your Run Control ID.

Personnel Actions History

Run Control ID: 11000
 [Report Manager](#)
[Process Monitor](#)
[Run](#)

Language:

Report Request Parameters

From Date:

Thru Date:

☐ Show Components

Actions

[Find](#)
[First](#)
[1 of 1](#)
[Last](#)

[Save](#)
[Notify](#)

[Add](#)
[Update/Display](#)

Follow the directions below to run your report on the process scheduler.

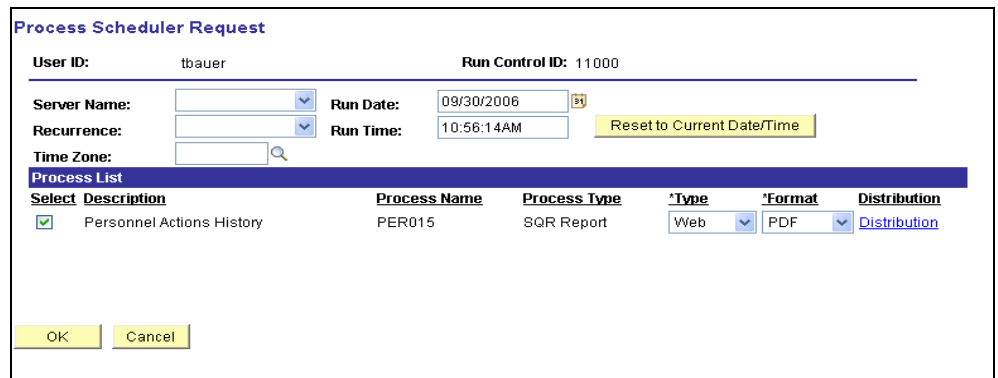
1. Fill in any parameters that are being requested. The ones used for this report are as follows:

Language – *English*
From Date – *January 1, 2006*
End Date – *Current Date*
Actions – *Hire*

This will produce a report of all employees hired during the 2006 calendar year.


2. Click on the  button.

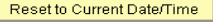
The **Process Scheduler Request** page will appear:




Process Scheduler Request



User ID: tbauer Run Control ID: 11000



Server Name: Run Date: 09/30/2006 

Recurrence: Run Time: 10:56:14AM 

Time Zone: 

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Personnel Actions History	PER015	SQR Report	Web	PDF	Distribution

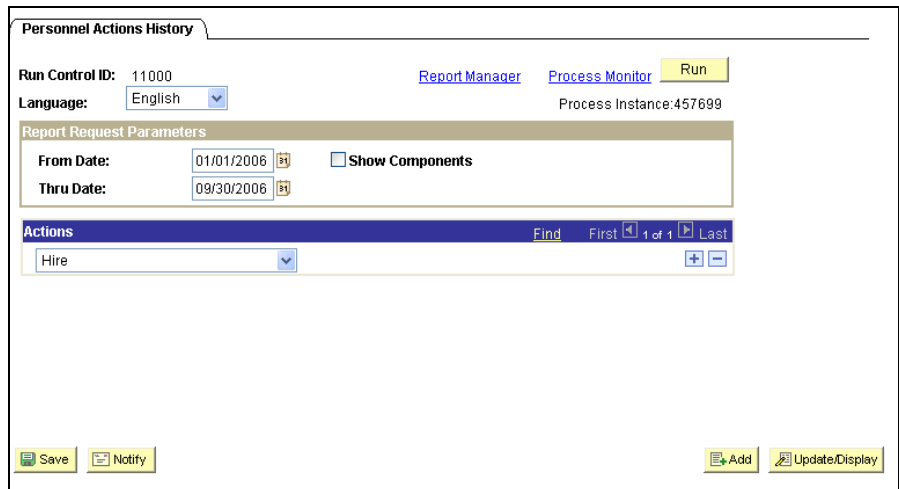
 

3. Enter *PSNT* in the **Server Name** field. This is where your process is going to run.
4. The **Type** and **Format** fields will default to the values set for the delivered report. These values can be changed from this page. *Web* and *PDF* are the most commonly used values.
5. Click the  button to continue, or the  button to cancel the process.
6. The word *Processing* will appear in the top right-hand corner while processing. The word *Save* will briefly appear when done.

You are now ready to check the status of your report.

CHECKING THE STATUS OF A REPORT

After you click the **OK** button on the previous page, you will return to the page listed below.



Click on the [Process Monitor](#) hyperlink. This will take you to the **Process List** page. The Process List page will display the Instance Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status and Details.

Instance Sequence	The order that your request is being processed.
Process Type	The process type that is being requested. Examples: SQR Report, Crystal, COBOL, Application Engine.
Process Name	The technical name for the report.
User	The User ID running the report.
Run Date/Time	The Date and Time of processed.
Run Status	The status of the report: Queued, Initiated, Processing, Posted, Success.
Distribution Status	When the Trace/Message Log is available.
Details	Link to view run logs and report results.

Process List

Server List

View Process Request For

User ID: tbauer

Type:

Last: 1 Days

Refresh

Server:

Name:

Instance: to

Run:

Distribution:

Status:

Save On Refresh

Process List

Customize | Find | View All

First 1 of 1 Last

Select	Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	471396	SQR Report	PER015	tbauer	10/23/2006 9:25:06AM CDT	Success	Posted	Details

[Go back to Personnel Actions History](#)

Save

Notify

[Process List](#) | [Server List](#)

Queued	Report is waiting to start processing.
Initiated	Report has begun processing.
Processing	Report is processing.
Posted	Report is posted in the Report Manager.
Success	Report has completed successfully.
Error	Report did not complete successfully.

Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run, therefore you may not always see all of the processing stages.

Your user ID appears in the **User** field. You can use the navigation arrows on the screen to scroll through the list. Use the **Server**, **Type**, **Run Status**, **Last**, and **Instance** list boxes to limit the processes that Process Monitor displays.

Click [Refresh](#) to update this page with the latest system activity. If the **Run Status** column says *Initiated* or *Processing*, the report is still running. When it says *Success*, the system has finished running the report.



After you have received a run status of *Success* and a Distribution Status of *Posted*, click on the Details hyperlink and the following page will appear:

Process Detail	
Process	
Instance: 457699	Type: SQR Report
Name: PER015	Description: Personnel Actions History
Run Status: Success	Distribution Status: Posted
Run	
Run Control ID: 11000	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSNT	<input type="radio"/> Cancel Request
Recurrence:	<input checked="" type="radio"/> Delete Request
	<input type="radio"/> Restart Request
Date/Time	
Request Created On: 09/30/2006 11:00:04AM CDT	Parameters Transfer
Run Anytime After: 09/30/2006 10:56:14AM CDT	Message Log
Began Process At: 09/30/2006 11:00:18AM CDT	Batch Timings
Ended Process At: 09/30/2006 11:03:36AM CDT	View Log/Trace
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

From this page you can view the Parameters that you requested your process from, any message logs and the actual report results.

VIEWING REPORT RESULTS





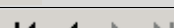


The following instructions will allow you to view the results of your report.

1. Click on the View Log/Trace hyperlink and the **Report Log Viewer** page will appear.

View Log/Trace		
Report		
Report ID: 1011	Process Instance: 457699	Message Log
Name: PER015	Process Type: SQR Report	
Run Status: Success		
Personnel Actions History		
Distribution Details		
Distribution Node: REFNODE	Expiration Date:	10/07/2006
File List		
Name	File Size (bytes)	Datetime Created
PER015_457699.PDF	595,011	09/30/2006 11:03:36.493000AM CDT
Trace File	165	09/30/2006 11:03:36.493000AM CDT
Message Log	1,615	09/30/2006 11:03:36.493000AM CDT
Distribute To		
Distribution ID Type	Distribution ID	
User	tbauer	
<input type="button" value="Return"/>		

- Note:** The PER015 – is the Process Name that we requested earlier. The Message Log will display error messages for runs that were not successful. The Trace File is used by technical staff.

[illegible]

	Save to a file
	Send report to the printer
	Zoom In for larger view
	Zoom out for small view
	Navigate through pages
	Page actual size
	Page fit in window

VIEWING PREVIOUS REPORTS

To check the status of your report, or view previously ran reports, you can navigate to: **PeopleTools > Process Scheduler > Process Monitor**. Change the number of days to how many days you need to go back and hit **Refresh**, all reports ran for that time period will show up.

CANCELING OR HOLDING REPORT REQUESTS

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete its information from Process Monitor. Click **Details** to display the options for canceling or holding a request.

EMAILING THE REPORT

Choose type of *Email* and *HTM* when you are initially running the report.

Note: If you are entering a list of email addresses, make sure to use a **semicolon** to separate each address from the others.

You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper Setting Report Distribution. The **Distribution Detail** page allows you to choose the recipients of your process output. To set up distribution for your process output, click on the **Distribution** hyperlink.

If the process that you are running allows output that can be emailed, you can enter an email subject and message and send the output to a group of email addresses with security to view this output.

Note: You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

You can also run the report as a .PDF file and email it. The formatting on the .PDF file is much easier to read.

WORKING WITH QUERY

VIEWING AN EXISTING QUERY

Navigate:

Main Menu > Reporting Tools > Query > Query Viewer

Query Viewer
Enter any information you have and click Search. Leave fields blank for a list of all values.
***Search By:** begins with
 [Advanced Search](#)

Click on the '**Search**' button for a list of available queries if you do not know the name of the query you are going to run. You can also narrow your search by enter the first few letters.

The query name will appear in the 'Search Results' as shown below:

Note: You can also enter the name of the Query in the search box.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: Query Name begins with NDS_PR165

Search [Advanced Search](#)

Search Results

'Folder View: -- All Folders --

Query				Customize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites		
NDS_PR165_DEDUCTIONS		Public		HTML	Excel	Schedule	Favorite		

You may click on the 'HTML' link to show the results of the query on your screen. If you would like the query results to appear in a spreadsheet click on the 'Excel' link.

The following screen shows the results for clicking on 'HTML'.

Some queries will have prompt boxes that must be completed before the query will run successfully. After you have completed all of the prompt fields, click on 'View Results'.



State of North Dakota

NDS_PR165_DEDUCTIONS

Business Unit:

On Cycle Pay Period End Date:

Off Cycle Pay Period End Date:

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) (153 kb)

[View All](#)

First 1-100 of 520 [Last](#)

	Group	Unit	DeptID	Pay Period End Date	ID	Name	Deductn Cd	Ded Class	Descr	Curr Dedn
1	PG1	11000	110150	07/31/2006			P10101	N	Dakota Plan EPO	553.94
2	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
3	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
4	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
5	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
6	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
7	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
8	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
9	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
10	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
11	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
12	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
13	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
14	PG1	11000	110110	07/31/2006			P10101	N	Dakota Plan EPO	553.94
15	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
16	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94
17	PG1	11000	110118	07/31/2006			P10101	N	Dakota Plan EPO	553.94
18	PG1	11000	110130	07/31/2006			P10101	N	Dakota Plan EPO	553.94

Note: If once you view the results of the query you would prefer to see the results in an Excel Spreadsheet, you may click on the link 'Excel Spreadsheet' to do this.